

Finance Essentials for Treasurers and Trustees

Course content

The course covers a basic level of information related to financial procedures for Treasurers and Trustees, including: Record keeping, reporting, and preparing financial statements; Updating the Charity Commission Register; Financial Policies; Expenses; Charity Commission Requirements; and annual accounts and independent examination.

It is a great course for those who want to learn more about the financial responsibilities required for a charitable organisation, with examples to help solidify the learning. It is particularly useful for those unfamiliar with the role of treasurer, and the legal implications of being a trustee. It can equip Trustees with confidence in undertaking financial reporting and ensuring that their organisation is complying with Charity Commission requirements.

Questions you will be able to answer

- What are the roles and responsibilities of the Treasurer and Trustees?
- What does the Charity Commission require from us, and what is an Annual Return?
- What financial policies should we have in place?
- Can we pay trustee expenses?