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→ fundraising training ltd

understanding charitable trust finances

date: 17 May 2012 tutor: Bill Bruty cost: 200 +VAT

venue: St Bride Foundation, Bride Lane, Fleet Street, London EC4Y 8E [MAP](#)

This course is essential for any trust fundraiser. Before reading any of your promotional materials or looking at your website, most trusts will investigate your audited accounts. You will need to understand and address the issues that they uncover.

Likewise the accounts of a trust will give you a valuable insight into their world – where their money comes from, future levels of grantmaking and patterns in their giving behaviour. You will come away from this course with a command of key financial data and an understanding of how this can improve your fundraising.

Fundraising Training Ltd was set up by Bill Bruty in 2002 to provide high quality training for high value fundraising.

understanding charitable trust finances

This course is suitable for...

...people who are new to Trust Fundraising or have some experience but want to unravel the mysteries of the crucial accounting documents.

The audited accounts of charities and grantmakers are a 'window into our souls'. This course will equip you to understand how the finances of trusts influence their grantmaking and how the finances of your charity influence their funding decisions.

Learning outcomes

As a result of attending this course, you will be able to:

- understand the key elements of your charities accounts:
 - SOFA
 - Balance Sheet
- offer explanations for questions that may arise from your accounts. eg reserves and fundraising costs.

The tutor

Bill Bruty has been in fundraising for over 26 years. He has been a Fundraising and Marketing Director in two national charities (BTCV, Children's Aid Direct and Farm Africa) and has successfully raised money from every type of donor. He is recognised as one of the UK's leading fundraising trainers.



Course programme

- 09.45 Registration and coffee
- 10.00 Understanding the accounts of a charitable trust.
The balance sheet and Statement of Financial Activities (SOFA).
- 11.00 Coffee
- 11.15 Understanding income sources for trusts
...and how this influences their giving.
- 12.30 Lunch
- 13.30 Understanding your own charity's accounts.
- 15.00 Tea
- 15.15 Explaining the issues in your accounts
- 16.15 Course Review and Evaluation
- 16.30 Depart

THE VENUE Fundraising Training Ltd prides itself on using some of London's most intriguing and historic venues. St Bride Foundation provides the perfect setting for participants to learn and develop in a unique, creative environment.