

Charities

Charities often face unique challenges. They benefit from advice given by lawyers who understand the issues and opportunities they face in today's climate and who in turn can offer innovative yet practical and relevant solutions. Our Charities Team provides the experience and know-how necessary to ensure we deliver advice that is pragmatic, proactive and more importantly, focused on the client and their needs. Our experienced team of lawyers work for a number of charities and are familiar with the diverse range of issues that charities can come across.

We are a member of the Charity Law Association and regularly advise third sector, private and public sector clients on a range of issues, including governance matters, mergers and setting up joint ventures for public service delivery. Our advice is supported by a programme of regular briefings, newsletters, training and seminars.

"The one thing you can always say about this firm is that the quality of the lawyers is top-notch." – Chambers



HOW WE CAN HELP

Project managing complex transactions

We are currently advising an unincorporated arts charity on its corporate restructure to facilitate a redevelopment of one of its museum sites. This involves the incorporation and registration of a new corporate charity so as to secure limited liability and facilitate a VAT group structure with the existing trading subsidiary to ensure retention of the cultural exemption for VAT whilst making recoveries on construction costs. We have also advised on pension fund deficit issues, the use of the existing trust's endowment and the appointment and contractual terms of the contractor and professional team for the £10 million capital build project.

"The service and advice provided is always excellent." – Legal 500

Achieving results

We advised the Coalfields Regeneration Trust on delivery structures for its legacy project to establish a special purpose vehicle (SPV) to roll out local regeneration schemes across the country under the auspices of Community Land Trusts. Our involvement included drafting the governing documents and incorporation of the SPV as a company limited by guarantee and establishing the suite of governing documents for the first Community Land Trust charity. We also prepared charitable registration for both the SPV and the Community Land Trust, and provided detailed tax and property advice, obtained HMRC clearances along with the provision of necessary property structure documentation for the project.

Value creators

We offer ongoing support and assistance in the form of charity trustee training, including training packages specific to local authorities in their role as trustees of charities and trustees of charities in the education sector. We produce regular newsletters to keep clients informed of current issues and developments affecting the sector, legislative updates and useful commercial and practical guidance.

"Clients have reported a quality of service that makes it clear that they value your business." – Chambers



Supporting you as a trusted adviser

We have been an adviser to the City of Wakefield Metropolitan District Council for many years and recently worked with the Council to establish and incorporate the charitable trust that runs the new Hepworth Gallery in Wakefield. We used a streamlined process to complete the project in 12 months and worked closely with the client's project officers. This meant that not only were management timetables reduced to fit with construction programmes, but a tax-efficient solution of a trust was created, delivering real benefits to the client and the stakeholders.

"The inspirational way the team were able to work cohesively and seamlessly together was a key factor in the successful delivery of the project." – Wakefield MDC

AREAS OF EXPERTISE

- Charitable structures
- Charity registration
- Companies and charity law advice
- Constitutional advice
- Creation of charities
- Drafting and review of grant applications, terms and conditions
- Education
- Employment
- Governance
- Information governance
- Leisure and culture
- Local government
- Mergers
- Options appraisals
- Pensions
- Public benefit requirements
- Public procurement and tenders
- Real estate
- Regeneration and housing
- Service level agreements with local authorities and other organisations
- Social enterprise and other delivery vehicles
- Tax advice
- Trustee training

WALKER MORRIS

"A distinctive law firm valued by its clients for consistently delivering excellent results."

We offer our clients a full service commercial law firm focused on providing a wide range of clients, nationally and internationally, with partner led high quality advice. The national centre of excellence in Leeds that we have built offers significant advantages in terms of developing a strong team-based culture within the Firm, with the inherent value and cost effectiveness that a Leeds base brings.

The success of our model is reflected by our clients, which are drawn from a broad range of sectors. We are recognised for our strong multi-disciplinary teamwork and straight forward advice. Both the Firm and our lawyers are recognised as leaders in their fields with 96 per cent of our partners recommended in either Chambers or Legal 500 for their expertise..

CONTACT

David Kilduff,
Consultant

+44 (0)113 283 2643
david.kilduff@walkermorris.co.uk

Richard Auton,
Consultant

+44 (0)113 283 2575
richard.auton@walkermorris.co.uk

Walker Morris LLP
33 Wellington Street
Leeds LS1 2HL

T +44 (0)113 283 2500
F +44 (0)113 245 9412
www.walkermorris.co.uk

