

Winckworth
Sherwood



Charities

*“An impressed source notes that the lawyers
‘were simply delightful and provided the best
client care I have experienced from a law
firm’.”*

CHAMBERS

Specialist Charity Lawyers

Winckworth Sherwood's Charity team sits at the heart of the sector.

We advise national fundraising charities, not-for-profit bodies, philanthropists, social enterprises, schools and academies and local authority spin-outs.

We take time to get to know our clients, providing tailored advice which helps them deliver on their charitable purposes.

Our expertise covers all aspects of charity law from setting up charities and foundations, mergers, governance advice, statutory inquiries, regulatory compliance and trustee issues, through to legacy disputes, philanthropy and fundraising.

Clients

Greenwich Hospital	Diocesan Boards of Finance
Trustees and Senior Executives of Oxfam	The Brooke Hospital for Animals
RSPCA	Christian Aid
Oxford Colleges	Blue Cross
Cambridge Colleges	NSPCC
Cystic Fibrosis Trust	RNLI
Parkinson's UK	The Save the Children Fund
The London Diocese Fund	Cats Protection



Winckworth Sherwood



"It is a team that prides itself on the value of innovation, and works with clients to build a lasting relationship"

CHAMBERS

"The team always provides the results required and has excellent expertise."

CHAMBERS

Our Charity Services

ESTABLISHMENT OF CHARITIES

- Legal structures
- Trustee recruitment and induction
- Trustee duties and responsibilities
- Managing trustee conflicts of interest
- Governing documentation

GOVERNANCE AND REGULATORY

- Regulatory and compliance advice
- Policies and procedures
- Investigations
- Charity Commission Statutory Inquiries
- Governance reviews
- Ensuring governing documents are up to date and fit for purpose
- Undertaking skills audits
- Advising on terms of reference for committees
- Reputation management

COMMERCIAL

- Advising on the relationship between the parent and subsidiary
- Contract terms and risk management
- Creation of trading subsidiaries
- Protecting confidentiality
- Renewal and termination of contracts
- Outsourcing and IT

PHILANTHROPY

- Setting up charitable structures
- Administrative advice and compliance services
- Day-to-day management of charitable structures
- Tax efficient charitable giving

CORPORATE

- Collaborations
- Joint ventures
- Mergers

LEGACY DISPUTES

- Mediation and alternative dispute resolution
- Managing public profile

REAL ESTATE

- Development, sales, purchases, leases and lettings
- Real estate disputes
- Charity land

COMMERCIAL DISPUTE RESOLUTION

- Commercial and services contract disputes
- Negligence actions against advisors
- Reputation management and defamation

EMPLOYMENT

- Day-to-day advice
- Maternity and paternity
- Grievances, disciplinary and discrimination
- Whistleblowing
- Tribunals

DATA PROTECTION AND CYBER SECURITY

- GDPR compliance
- Data Impact Assessments
- Cyber security

SECTOR SPECIALIST CHARITY ADVICE

- Local authority spin-outs
- Academies and schools
- Churches
- Social housing providers

Our Specialist Team



ALISON TALBOT

Partner, Charities
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Partner and Head of National Charities, Alison specialises in all aspects of contentious and non-contentious work for charities. Ranked as a leading individual in the Legal Directories, she has considerable experience in providing strategic, pragmatic and commercial advice to a wide range of charities, social enterprises, educational institutions and individuals. With extensive experience in charity law and governance she regularly engages with the Charity Commission and is highly skilled in supporting charities through disputes, distress situations and organisational change. Alison has advised charities in relation to high profile Charity Commission investigations and inquiries, and has a strong track record of working with charities to handle the media and protect the charity's reputation.



PHILIP COLLINS

Partner, Charities
+44 (0) 1865 297 202
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Philip is an expert in handling a range of disputes for charities and private individuals involving the administration of an estate or trusts (often involving instances of fraud), challenges to wills on grounds of testamentary capacity, lack of knowledge and approval, improper execution and undue influence. Philip has advised a number of charities in relation to Charity Commission investigations, regulatory compliance cases and formal statutory inquiries. Philip regularly works with PR agencies and in-house media teams to assist charities with managing their reputation.



JOANNA BUSWELL

Partner, Charities &
Social Enterprises
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Joanna has over 20 years' experience advising charities and social enterprises and is recognised in the legal directories as one of the UK's leading charity experts. She has particular expertise in relation to charities in the leisure, arts and cultural sector. Joanna advises on all aspects of charity law with particular regards to the establishment of new charities, including the recruitment, selection and appointment of trustees. Joanna regularly undertakes governance reviews to ensure her existing charity clients' governance arrangements are up to date and fit for purpose and the charity is in the best possible position to fulfil its charitable purposes.



DARREN OLIVER

Partner, Church and
Charities
+44 (0)186 529 7210
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Darren is an ecclesiastical, property and charity solicitor, advising charities and organisations, ecclesiastical office holders (such as bishops and clergy), parochial church councils, diocesan boards of finance, other diocesan bodies, schools and private charitable trusts and companies.



TIM SNAITH

Partner, Private Wealth,
Trusts & Tax
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Tim is a Partner in Winckworth Sherwood's Private Client team, regularly advising on trusts, estates and succession planning (including the many tax issues that arise with the same, along with the problems presented by the loss of mental capacity). He has particular expertise in setting up philanthropic and charitable structures.



ROGER FITTON

Partner, Real Estate
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Roger is the firm's Managing Partner and heads the development and regeneration team. He specialises in large urban regeneration projects, residential developments and mixed use schemes for house builders, housing associations, local authorities and charities. Roger lectures and has published articles on the legal aspects of regeneration projects.



**AIDEN
HARGREAVES-SMITH**

Partner, Church Law
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Aiden acts for a wide range of private and institutional clients, including major charities, Diocesan Boards of Finance, individual parishes and clergy, Bishops and Cathedral Chapters. His work involves the interaction of different legal disciplines, especially charity law, trust law, property law and ecclesiastical law. Recommended by Legal 500, he is described as "bright, thorough, dogged and wholly reliable", and has "remarkable knowledge of Church law".



JON BALDWIN

Partner, Corporate
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Jon specialises in finding pragmatic, commercial and risk-aware solutions for companies operating in a regulated sector, public bodies, charitable organisations and others wishing to do business with them. Jon has particular expertise in public procurement. He advises authorities and bidders both as to the conduct of procurement exercises themselves, but also on building a procurement strategy, making modifications to existing contracts and dealing with challenges.



SUSAN KELLY

Partner, Employment
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Susan advises on all aspects of the employment relationship, as well as the increasingly common flexible variations on that traditional model. Susan also acts regularly in partnership disagreements, boardroom difficulties and shareholder disputes. She has advised dioceses and parishes on issues ranging from discrimination to redundancy, allegations of abuse and disciplinary action.



ANDREA SQUIRES

Partner, Education
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Andrea heads our Education practice, supporting a range of schools and colleges, both independent and maintained. She advises a number of charitable foundations and church bodies holding land on behalf of schools, advising on governance and trustee responsibilities, sponsorship and strategic collaboration and complex site development projects.



JANE ROBINSON

Senior Associate,
Charities
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Jane is a Senior Associate in Winckworth Sherwood's charities team, where she specialises in the administration of both straightforward and complex high value estates and trusts, for both national and local charity clients as well as for private individuals. Jane's approach is to seek to resolve problem estates/trusts before they become contentious, whilst seeking a pragmatic and effective solution for her clients.



PHILIP ALLEN

Senior Associate, Private
Wealth, Trusts & Tax
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Philip's practice involves the full spectrum of private client law with particular emphasis on inheritance tax and succession planning for mainly UK clients. His work can encompass wills, the creation, administration, restructuring and termination of lifetime trusts and the administration of estates involving complexities such as cross-border issues and business assets. Philip also advises on capital gains tax, particularly in the context of main residence relief and of divorce, as well as powers of attorney.



JENNIFER MARLEY

Associate, Charities
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Jennifer specialises in providing clear, practical advice to charities and social enterprises. Jennifer advises on a broad range of matters including charity and social enterprise structures (including trading subsidiaries and social enterprise/charity group structures), registration, mergers, restructuring and governance arrangements. Jennifer also supports clients in relation to Charity Commission investigations and statutory inquiries, and serious incident reporting.

"The team is knowledgeable
and understanding of the
pressures that charities are
under."

CHAMBERS

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