

CHARITY TAX GROUP PROGRAM

EARLY MORNING

TIME	SESSION NAME	DESCRIPTION	ORGANISATION	SPEAKERS
9:00	REGISTRATION			
9:30	WELCOME FROM THE CTG CHAIR	Hello from Richard and a brief mention of his recent interactions with HMRC and the new Structure Risk Review process	CHARITY TAX GROUP/ CRUK	RICHARD BRAY
09:50	HMRC ON CHARITIES TAX COMPLIANCE AND OTHER ISSUES INC 15 MINS FOR QUESTIONS	CTG has a very positive and strong working relationship with HMRC and so we are delighted that Mark, Tony, and Darren are joining us today to talk about tax policy and compliance. Within our available resource envelope, we all aim to be good taxpayers. From the other side of the fence, Mark, Tony, and Darren will give us some insight into what HMRC think a good taxpayer looks like, as well as what the recent changes in the charity tax landscape and compliance activity mean for your charity	HMRC	MARK PICKARD, TONY JOHNSON, & DARREN MACDONALD
10:50	15 MINUTE FOCUS - TAX GOVERNANCE - HOW DOES IT HELP COMPLIANCE?	Following on from HMRC's session, Scott will discuss how Tax Risk Governance (TRG) is becoming more important than ever, and how it supports charity tax compliance	RSM	SCOTT HARWOOD
11:10	MORNING COFFEE			



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LATE MORNING

TIME	SESSION NAME	DESCRIPTION	ORGANISATION	SPEAKERS
11:30	15 MINUTE FOCUS - HOW DO NMW AND SALARY SACRIFICE WORK TOGETHER?	Will the increases to National Living and NMW impact on more than just the rate of pay? Siobhan will explain the wider implications and additional risks that come with the increased rates, including whether they could frustrate some salary sacrifice arrangements implemented to benefit employees.	BDO	SIOBHAN WATERS
11:50	WHERE ARE WE WITH BUSINESS/NON-BUSINESS?	Two years on from the introduction of the 2 stage test, Sue and Michael will look at how charities should identify business and non-business income, where there remains a lack of clarity.	MHA	SUE RATHMELL & MICHAEL SAMUEL BRYAN
12:25	15 MINUTE FOCUS - HOW WE ENGAGE WITH HMRC'S TAX LAND AND PROPERTY LIAISON GROUP	Taxpayer engagement with HMRC is essential for the effective development of tax administration. As a member of the HMRC Tax Land and Property Group representing CTG, Karen will explain the purpose of this group, what current issues they are working through, and how you can engage (and benefit) by putting forward your topics for the group to consider	S3TAX	KAREN REGAN
12:45	LUNCH AND NETWORKING			



CHARITY TAX GROUP PROGRAM

POST LUNCH

TIME	SESSION NAME	DESCRIPTION	ORGANISATION	SPEAKERS
13:45	15 MINUTE FOCUS - FUNDRAISING - HOW A DAY OUT IN YORKSHIRE SHED LIGHT ON THE FUNDRAISING EXEMPTION	Soc is the first speaker in our fundraising theme. He will remind us of why the First Tier Tribunal (FTT) found in favour of the Yorkshire Agricultural Society, and consider what may emerge from the UT hearing in October.	BUZZACOTT	SOCRATES SOCRATOUS
14:05	15 MINUTE FOCUS - FUNDRAISING - HOW DO YOU GET GIFT AID RIGHT?	Gift Aid is hugely valuable to charities - but with that benefit comes compliance obligations. Barnaby will give us a whistle stop tour of his top tips for compliance	CHARITY TAX GROUP/ AGE UK	BARNABY BRAND
14:25	AFTERNOON REFRESHMENTS			



CHARITY TAX GROUP PROGRAM

FINAL SESSIONS

TIME	SESSION NAME	DESCRIPTION	ORGANISATION	SPEAKERS
14:45	FUNDRAISING - DONOR BENEFITS - HOW DO THE WORLDS OF VAT AND GIFT AID COLLIDE?	Can you have VAT and Gift Aid on the same donation? Kerry and Harriet will give us a quick run through of the alignment and conflicts between VAT and Gift Aid on donations where benefits are provided to the donors	CHARITY TAX GROUP/ BIG FOR TAX	HARRIET LATHAM & KERRY SYKES
15:20	FUNDRAISING - TAX AND PHILANTHROPY	Anna and Philip invite you to join their conversation about how tax influences philanthropy and how to educate donors and charities about tax incentives, which in many cases are poorly understood, especially when raising money from major donors.	CHARITY TAX GROUP/ PRISM THE GIFT FUND	ANNA JOSSE & PHILIP SPEDDING
15:55	CONFERENCE CLOSE		CHARITY TAX GROUP/ CRUK	RICHARD BRAY
16:00	REFRESHMENTS AND NETWORKING			



CHARITY TAX GROUP

SPEAKER DETAILS

Organisation	Name	Bio
Charity Tax Group/CRUK	Richard Bray	Richard is CTG's Chair and a member of HMRC's Charity Tax Forum. A chartered accountant, he joined Cancer Research UK shortly after its creation in 2002, having previously worked for KPMG for twenty years in varied audit and tax roles. He is a member of the Financial Reporting Council's Advisory Panel, having previously been a member of the Charities SORP Committee. Richard is CTG's representative on the ICAEW Charities Special Interest Group.
HMRC	Mark Pickard	Mark Pickard joined the Treasury in 2013 and now works in the Individuals Policy Directorate in HMRC as Head of Savings and Charities Policy
HMRC	Tony Johnson	Tony joined the Inland Revenue in 1990 and is a fully qualified tax inspector. Tony has extensive experience in charity taxation and has recently returned to the charity tax team in HMRC on a part-time basis
HMRC	Darren MacDonald	Darren joined the Inland Revenue in 2003 and has worked on HMRC's Charity Compliance Team since 2012. Darren's current role is the compliance lead for charitable expenditure.
RSM	Scott Harwood	Scott is VAT Partner at RSM UK with over 20 years of experience advising the public and third sector. Scott is also RSM's national lead for Tax Risk Governance (indirect taxes).
BDO	Siobhan Waters	Siobhan Waters is an Employment Tax Manager at BDO and eminent National Minimum Wage Specialist. As a former Civil Servant working in HMRC's National Minimum Wage Enforcement Team, Siobhan now supports clients across multiple sectors in meeting their obligations against the complex NMW rules.
MHA	Sue Rathmell	Sue is an Indirect Tax specialist with more than 30 years' experience of VAT, Insurance Premium Tax, excise and customs duties. As a VAT Partner she heads up the Indirect Tax services in the Kent-Gatwick region.
MHA	Michael Samuel Bryan	Michael is a Chartered Tax Advisor who has been with MHA since February 2019. His expertise in indirect tax helps deliver advisory and compliance services navigating the unique challenges the charity and not-for-profit sector face.

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Organisation	Name	Bio
s3Tax	Karen Regan	Karen has significant experience in VAT advisory roles, starting her career in the 'big 4' before a move into local government and in-house tax roles for over 30 years providing advice on wide range of complex issues including those related to local community-driven projects before moving to the team at S3TAX. Karen is a Chartered Tax Adviser and has been a member of the CIPFA VAT Committee, and the CIPFA representative at HMRC's Land and Property Liaison Group for over 10 years and now represents CTG on this group.
Buzzacott	Socrates Socratous	Having started his career at HMC&E, Soc joined the profession in 1990 and worked for both Crowe and PWC before running his own VAT consultancy for 15 years. Since 2018 Soc has been a partner and Head of the VAT consultancy Team at Buzzacott, specialising in charity and not for profit organisations
Charity Tax Group / Age UK	Barnaby Brand	Barnaby is a director of CTG and has worked in charity compliance for more than two decades, first at WWF-UK, and now at Age UK, his current role is Head of Privacy. He started out in Gift Aid compliance and has now developed expertise in Privacy (GDPR), PCI DSS and Fundraising Regulator compliance and is the Group Data Protection Officer for Age UK. He is an Internal Security Assessor for PCI DSS and worked closely with CTG on a range of issues including policy work with HMRC on Gift Aid.
Charity Tax Group / Big for Tax	Kerry Sykes	Kerry is the founding director of Big For Tax which provides technical support to CTG, as well as working with a broad range of charities and universities. Kerry is a Chartered Tax Adviser, and prior to becoming the boss of his own empire, despite his youthful looks, he has over 30 years of experience in VAT, as a Director at KPMG for 6 years and Deputy Director of Finance at Cambridge University for almost 20 years, having started his illustrious career with HMC&E.
Charity Tax Group / Big for Tax	Harriet Latham	Harriet is a co-director of Big For Tax. Prior joining BfT earlier this year, she was the tax manager at University of Glasgow, and before that worked at The Open University for almost 10 years. She is a Chartered Tax Adviser and also trained as a Chartered Accountant with PWC. She specialises in managing tax risk through better processes and controls.
Prism the Gift Fund	Anna Josse	Anna founded and is CEO of Prism the Gift Fund which is about to celebrate 20 years and has cumulative donation income of \$1bn, has distributed \$500m around the world, and has assets of approximately \$500m. Anna frequently talks about the tax incentives for giving and educates donors and charities.
Charity Tax Group	Philip Spedding	Philip is a director of CTG and has held a number of high profile roles in large charities including at Tate as the head of Individual Giving and Collection Development, Director of Development at The London Library, and roles at the British Library, CAF, and Arts & Business. He has close to 25 years of experience as a fundraiser and also has extensive experience in lecturing on the development of arts and private sector partnerships across the UK and internationally.

CHARITY TAX GROUP

DELEGATES

First Name	Last Name	Email	LinkedIn
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Vanda	Hagan	vanda.hagan@factoryinternational.org	

GET INVOLVED

Would you like to get more involved in Charity Tax Group?

We would love to find more enthusiastic people for our board and are also looking to create a new Technical Advisory Group who will work with us to ensure we're keeping our membership up to date with everything charity tax and that we have our finger on the pulse at all times!

If you're interested in any of these roles please speak to any member of CTG board here today or email

admin@charitytaxgroup.org.uk

BEFORE YOU GO...

For us to provide an even better event in 2025, we would love to hear your feedback.

Please use this [link](#) to submit your thoughts.

