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LUCAS  
LEES

CHARTERED ACCOUNTANTS & REGISTERED AUDITORS

# YOU KNOW WHAT YOU REALLY NEED...



Free VAT advice -  
Save money,  
and reclaim VAT  
over-paid!

A helping hand  
when I want it

Confidence and  
peace-of-mind  
with the bigger  
decisions

Accounts  
that GLOW  
(for my funders)

Good honest  
value for money,  
and a one-stop-shop  
for all my  
finance answers

A local  
Accountant who  
speaks my language,  
and hears  
my concerns

So you'll want TLL  
Charity Accountants

Together,  
we'll achieve all this -  
whatever your size of charity

CALL NOW  
**01772 812 163**

# Charity Health Check

Please pass this form on to your Chief Exec, Finance Manager or Treasurer to complete – to help gauge how ‘healthy’ your charity is.

Charity Funding	Yes	No
Do you feel that your charity has enough money to carry out all of the aims it seeks to?	<input type="checkbox"/>	<input type="checkbox"/>
Have the trustees set out a reserves policy that describes how much the charity would like / needs to hold in cash / reserves?	<input type="checkbox"/>	<input type="checkbox"/>
Is there any concern that the charity looks over-funded which may prove to be a barrier with some funding bodies?	<input type="checkbox"/>	<input type="checkbox"/>

Charity Accounts	Yes	No
Your accounts are no-doubt SORP compliant - but are you confident that they present the best image to funders?	<input type="checkbox"/>	<input type="checkbox"/>
Do you make the most of the SORP exemptions to simplify the presentation of your accounts and make them easier to follow?	<input type="checkbox"/>	<input type="checkbox"/>

VAT	Yes	No
Have you had a ‘VAT Health-check’ in the past 18 Months – are you aware of all the VAT-free supplies available to Charities?	<input type="checkbox"/>	<input type="checkbox"/>
Do you raise any income that may be VATable (such as SLAs) or have you considered whether there may be benefits to registering for VAT?	<input type="checkbox"/>	<input type="checkbox"/>
Has your VAT reclaim percentage been reviewed in the past year (in light of the new benefits available)?	<input type="checkbox"/>	<input type="checkbox"/>

If you have ticked ‘no’ to any questions, **TLL would really like to speak to you** – and share with you the ways in which we are able to help. Whether this means being appointed as your Accountant / Advisers, helping with a one off exercise, or letting you ‘pick our brains’ free of charge now and again - we look forward to speaking with you.

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