



## CooDES Charities team

One of the many wonderful things about the Cornish is their willingness to give to good causes and their involvement with charities.

### What is the Charities team?

The Charities team at CooDES has evolved out of the well-respected Tax and Trusts Department. It consists of legal specialists across the firm to provide a multi-service approach to charity work. We understand the needs of charities and why they need to be effective 'businesses'. We provide clear advice tailored to the specific circumstances that make each charity client individual.

There are many benefits of charitable status including public recognition, trust, protection from exploitation, enhanced capacity to raise funds through grant application or otherwise and tax benefits. However with these benefits come also a number of burdens including registration, compliance and trustees' duties which must be understood and attended to. The Charities team at CooDES aims to help trustees manage these burdens and make the most of the benefits so that they can get on with the charity's front line work.

The team at CooDES has experience in dealing with charities at every stage; advice on whether charitable status is right for an organisation; advice on the structure of the proposed charity; the paperwork and administration required in forming and registering a charity and on-going advice to trustees who are responsible for the charity.

See overleaf for details of our services.

### Fixed price interview

For an initial look at any matter and so that we can provide you with the information you need and the cost options, you can meet with a member of the charities team for a fixed fee

**FIXED PRICE ONE  
HOUR INTERVIEW**  
**£125 + vat**



## Key contacts



Richard Pollock

**Head of the Charities team**  
**richard.pollock@coodles.co.uk**  
Liskeard - Tel: 01579 347600

Member of the Charity Law Association and a Member of the Society of Trust and Estate Practitioners (STEP). Richard is recommended in both the Legal 500 and Chambers & Partners directories on Private Client work.



Ed Coode

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St Austell - Tel: 01726 874700

Member of the Charity Law Association. Ed specializes in Private Client & Charity Law: Trusts, Partnerships, Tax Planning, Agriculture, Wills, Probate & Powers of Attorney.

See our website for more information [coodles.co.uk](http://coodles.co.uk)

You can visit any of our offices:  
**St. Austell, Truro, Newquay, Liskeard, Launceston, Penzance and Holsworthy**



## The charity sector thrives on its diversity

The combination of charity expertise plus a wide range of other specific teams means that we can assist your charity. Examples of some common issues are set out below:

### Charity Formation

Charities often start as small, informal collections of individuals with a common purpose but as the charity grows the organisation needs a greater formality and structure including registration with the Charity Commission. We can advise on the most suitable structure for your charity and draft the constitutional documents as required together with other supporting documents. Our service is designed to provide you with the professional reassurance you need to achieve your charity's goals in the most cost effective way possible. Recent work includes advising on the creation of new charitable trusts and charitable companies as well as advising on the merger of two museums.

### Charity Administration Services

We provide assistance with the day to day administrative running of charities including the formulation and review of policies and assistance with queries raised by the Charity Commission.

### Property

We offer a full range of property services and can assist with the acquisition and disposing of property (including leases and gifts) in compliance with the Charities Acts 1993 and 2006. We can prepare bespoke lease agreements to satisfy the requirements of Grant giving bodies and the Charity Commission.

### Education

We have an established and dedicated Academies team – all members of the Education Law Association who are able to advise schools on the Academy conversion process. The team can help schools establish an Academy Trust and will assist with the drafting of the Memorandum and Articles to govern the charitable company which will own and manage the school.

### Employment Law

We provide a full range of employment law services to charities through our dedicated Employment law team. We can advise on day to day HR issues including all aspects of the disciplinary and grievance process, policies and procedures, business restructuring, performance

and absence management, together with more unusual "one-off" employment situations.

We are also experienced in advising charities on business transfers, including the TUPE obligations, which can arise when there is a change of service provider after a tender process. Where it cannot be avoided, our team can represent your interests in an Employment Tribunal or Court.

### Legacy Management, Wills and Estates

Legacy fundraising is an increasingly important area for many charities but how should organisations raise awareness about this sensitive issue among their supporters?

Legacies contribute a huge sum, around £1.5bn a year, to charities but only 13% of Wills contain charitable bequests compared with 60% of the UK population who say they donate to charity.

We can advise you on all aspects of charity legacy administration to help your charity maximise its income and minimise problems and delays.

From time to time, charities need advice on their rights in order to protect charitable legacies left to them. Typically, problems are encountered with homemade Wills and their validity, unclear gifts and wrongly described Charities. We can advise you with regard to difficult or obstructive executors. We can defend Inheritance Act claims that may threaten gifts left to charities.

Richard Pollock heads the team and is a member of the Society of Trust and Estate Practitioners (STEP).

