

# consultancy helpline service

- ⑤ **Swift and direct access to professionals**
- ⑤ **No lengthy delays, high fees, or jargon**
- ⑤ **Just clear and considered personal advice for your situation**
- ⑤ **A package of support to ensure year-round assistance**

By subscribing to our Consultancy Helpline, you will be able to gain swift support by telephone or e-mail from one of our consultants on issues that may arise throughout the year.

In providing solutions to you, we will draw on our specialist professional knowledge and experience within the Christian Charity Sector.

Often, a church or charity just need to be pointed in the right direction, get clarification on a matter, or reassurance that you are doing the right thing. We are here to help. You can pick up the phone and chat through an issue or put your questions in an email.

Should you wish to explore matters further, requiring research, meetings or the preparation of documents, we will advise you of any fees in advance of them being incurred.

Each of our consultants has operated within their field of expertise for a significant period of time and has been involved in church and charity positions of responsibility.

Our consultants hold a broad range of professional qualifications. If satisfactory answers cannot be provided, we will suggest alternative resources, people or organisations that can. We already have good working relationships with relevant third party advisors.

## What range of advice is included?

Our experience covers a very wide range of advice including:

- Church and charity finance, accounting and taxation
- Human resources
- Payroll and employment (including employment status)
- Gift Aid and other tax incentives for giving to churches and charities
- Trustee responsibilities
- Property management
- Charity law and practice
- Specialist insurance

## Lead consultants:

Stephen Mathews	Finance, accounting, governance & employment contracts
Giles Arnold	Property law & practice
Mike Clarkson	Insurance
Margaret Gardner	Charity formation
Peter Fellows	Charity law/property law
Tim Waldron	Strategic planning/fundraising
Barry Gibbs	Human resources/employment
Steven Rumens	Payroll
Kevin Russell	Charity finance, accounting & law

## What does it cost?

The cost is determined by the size of the church / charity and whether you are an existing client<sup>1</sup> of Stewardship, according to the grid below.

Charity's gross income	Client	Non-client
£0- £100,000	£47 (£40 plus VAT)	£117.50 (£100 plus VAT)
£100,000 - £250,000	£88.13 (£75 plus VAT)	£176.25 (£150 plus VAT)
£250,000- £500,000	£146.88 (£125 plus VAT)	£293.75 (£250 plus VAT)
£500,000- £1 million	£235 (£200 plus VAT)	£470 (£400 plus VAT)
Over £1 million	Price on application	

These prices are subject to payments being made by Direct Debit. For non Direct Debit payments, please add 15%.

**If you would like to secure our advice for the next twelve months, please complete the attached application form and direct debit mandate and return it to us. If you prefer to pay by cheque, please add 15% to the above fees and attach a cheque, made payable to "Stewardship" to the application form.**

If you have any questions relating to the above, please contact Stephen Mathews: [stephen.mathews@stewardship.org.uk](mailto:stephen.mathews@stewardship.org.uk) or telephone 020 8502 8588.

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<sup>1</sup> See attached application form for list of qualifying services

# stewardship<sup>®</sup> direct debit instruction

We use Direct Debits to receive your payments. These are very cost effective for us and more convenient generally for customers than Standing Orders. Some people have reservations about Direct Debits but you will always be given at least 5 working days notice of any change in the amounts (where relevant) and you are at liberty to cancel the instruction with your bank/building society at any time.

The terms of the formal Direct Debit Guarantee are set out below. Please retain this.

## THE DIRECT DEBIT GUARANTEE



- This Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank or Building Society
- If the amounts to be paid or the payment dates change, Stewardship will notify you at least 5 working days in advance of your account being debited or as otherwise agreed
- If an error is made by Stewardship or by your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid
- You can cancel a Direct Debit at any time by writing to your Bank or Building Society. Please also send a copy of your letter to us

Please complete the form, detach it and send it to us.

Keep this part for future reference.

## stewardship<sup>®</sup> INSTRUCTION TO YOUR BANK OR BUILDING SOCIETY TO PAY DIRECT DEBITS



Please fill in the form and send to: Stewardship, PO Box 99, Loughton, Essex IG10 3QJ

Please use **BLOCK CAPITALS**.

### Name and full postal address of your Bank/ Building Society

To: The Manager	Bank/Building Society
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Address 1:	
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Address 2:	
-----	
Address 3:	
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Postcode:	

### Name(s) of Account Holder(s)

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### Bank/Building Society account number

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### Branch Sort Code

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### Originator's Identification Number

9	8	2	1	1	7
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### Reference Number (For use by Stewardship only)

0					
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### Instruction to your Bank or Building Society

Please pay **Stewardship** Direct Debits from the account detailed on this instruction subject to the safeguards assured by the Direct Debit guarantee. I understand that this instruction may remain with Stewardship and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s)
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Date

**DO NOT SEND TO YOUR BANK/BUILDING SOCIETY**

Banks and Building Societies may not accept Direct Debit Instructions for some type of accounts

consultancy helpline

## consultancy helpline service application

please complete and return to: Stewardship, PO Box 99, Loughton, Essex IG10 3QJ

Name of church/charity	
Name of contact	
Address	
Daytime telephone number	
Alternative phone number	
Email address	
Expected gross income of church/ charity for the current financial year	

Please indicate which of our **qualifying** services below you already use (if any):

Sovereign Account for churches/charities  
 Payroll Bureau  
 Mortgage Account  
 Accounts Examination  
 Other recurring Accounting Services  
 Property Services

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Please indicate which of our **other** services you have used (if any):

Sovereign Account for individuals  
 Sovereign Payroll Giving  
 Insurance  
 Charity Formation  
 Deposit Accounts  
 Employment Contract Pack  
 Attended a Seminar

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

I have completed either

- A direct debit instruction

or

- Enclose a cheque for £ (including the 15% supplement) payable to "Stewardship".

For office use only

Database		Contact		Bulletin	
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