

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
Peter Fellows	Charity law/property law
Mike Clarkson	Insurance
Margaret Gardner	Charity formation
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 client¹ of Stewardship, according to the grid below.

Charity's gross income	Client	Non-client
£0- £100,000	£50 (including VAT)	£120 (including VAT)
£100,000 - £250,000	£90.00 (including VAT)	£180.00 (including VAT)
£250,000- £500,000	£150.00 (including VAT)	£300.00 (including VAT)
£500,000- £1 million	£240.00 (including VAT)	£480.00 (including VAT)
Over £1 million	Price on application	

These prices are subject to payments being made by annual 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 or telephone 020 8502 8588.

¹ See attached application form for list of qualifying services

stewardship[®] 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.

<p>THE DIRECT DEBIT GUARANTEE</p> <p>This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.</p> <p>If there are any changes to the amount, date or frequency of your Direct Debit Stewardship will notify you (normally 10 working days) in advance of your account being debited or as otherwise agreed.</p> <p>If you request the organisation to collect a payment, confirmation of the amount and date will be given to you at the time of the request.</p> <p>If an error is made in the payment of your Direct Debit, by Stewardship or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.</p> <p>If you receive a refund you are not entitled to, you must pay it back when the organisation asks you to.</p> <p>You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.</p>	
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Please complete the form, detach it and send it to us.

Keep this part for future reference.

stewardship[®] 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
Address 1:	
Address 2:	
Address 3:	
Postcode:	

Name(s) of Account Holder(s)

Bank/Building Society account number

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Branch Sort Code

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Service User 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)
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".