CharityFinance Summit

Future-proofing finance. Powering Purpose.

08.10.2026

133 Houndsditch, London

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Charity Finance Summit 2026



Tristan Blythe, editor, *Charity Finance*



Jenni O'Donovan, events director, Civil Society Media

Now in its nineteenth year, the Charity Finance Summit remains a highlight of the sector calendar and a must-attend event for charity finance professionals, leaders and trustees navigating an increasingly complex landscape. As charities face mounting financial pressure, economic uncertainty and rising demand, the need for resilient financial leadership has never been greater. Finance teams are being asked to do more than steward resources – they are expected to help shape organisational strategy, support innovation and ensure long-term sustainability.

This year's theme, **Future-Proofing Finance. Powering Purpose.**, reflects the challenges and opportunities defining the sector in 2026. From the rise of AI and digital transformation, to the implications of the new SORP and increasing scrutiny on governance, risk and accountability, finance leaders and boards must adapt quickly while remaining mission-focused.

Designed in response to sector insight and delegate feedback, the Summit brings together experts, peers and practitioners for a day of practical learning and valuable networking, delivered through a broad programme of technical and strategic content.

Join us on 8 October to explore the ideas, innovations and leadership strategies shaping the future of charity finance – and discover how your organisation can continue to deliver impact in a rapidly evolving world.

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PROGRAMME AT A GLANCE

08:45	Registration
09:20	Conference welcome
09:25	Opening keynote
10:05	Networking and refreshment break
10:40	Morning sessions
12:50	Lunch break
13:55	Afternoon sessions
15:20	Networking and refreshment break
15:45	Afternoon sessions
16:30	Final reflections
17:00	Networking reception

CharityFinance WEEK
5-9 OCTOBER 2026

On 5-9 October 2026 we will be celebrating excellence in charity finance practice through a dedicated week of content and thought-leadership initiatives, with the Charity Finance Summit forming the centrepiece of the week.

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> "A really enjoyable day, great to connect with old and new colleagues and hear from some amazing speakers."
>
> Nick Hughes, Diabetes UK

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With speakers from:

Blesma – The Limbless Veterans
Civic Power Fund
Full Fact
Keep Britain Tidy.
MyTime Young Carers
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willow Charity Consulting

Venue: Convene at 133 Houndsditch



Located in City of London, Convene 133 Houndsditch is a 49,000-square-foot conference and exhibition venue spanning two floors.

Conveniently situated near Liverpool Street Station and within walking distance of Spitalfields Market and Brick Lane, Convene 133 Houndsditch is easily accessible via public transportation.

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By Train:

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Parking:

Minories Car Park is a 10 minute walk from 133 Houndsditch.

CharityFinance

Subscribers to Charity Finance can save £20 on tickets

Published 10 times a year, Charity Finance is packed with practical articles and analysis of the latest financial trends, as well as in-depth briefings on technical and legal changes, and benchmarking surveys to help busy finance teams get value for money. With a 25-year history, Charity Finance is the leading finance publication for the sector.

Each issue includes:

- Features and analysis on the latest talking points in sector practice and government policy
- Briefings on the latest developments in tax, law and regulation
- Thought-provoking interviews with visionary sector leaders
- Each month we deep dive into a topical issue in the sector
- Case studies showcasing best practice and innovative projects
- Latest data on the sector's income streams and investment portfolios

Plus regular surveys such as:

- The Charity Audit Survey – charts charities' satisfaction with the leading firms and has been widely credited with helping to suppress audit-fee inflation
- Charity Fund Management Survey – an in-depth insight into the investment firms serving the sector, as well as the latest trends
- Charity Banking Survey – which banks are the most popular in the sector and how do charities rate their services?
- Charity Pooled Funds Survey – this survey canvasses fund managers' views on the risk and return characteristics of pooled funds

Find out more at civilsociety.co.uk/cfmag



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MORNING SESSIONS

Programme sessions and speakers are subject to change at any time

08:45	Registration, refreshments, networking & time to visit exhibition				
09:20	Welcome from **Tristan Blythe**, editor, *Charity Finance*				
09:25	**Opening keynote – The Age of AI: Who's Really in Control?** AI is transforming how we work, shop, communicate and make decisions—but the biggest question isn't what AI can do, it's what it is doing to us. In this thought-provoking keynote, Jamie Bartlett explores the opportunities, risks and hidden consequences of our rapidly changing relationship with technology, and asks how businesses and individuals can harness AI without losing control of the human values that matter most. **Jamie Bartlett**, technology author and podcaster				
10:05	Networking and refreshment break				
	Stream A – Vat, Tax & Accounting	**Stream B – Governance & Leadership**	**Stream C – Risk & Strategy**	**Stream D – Investment**	**Stream E – Technology & Transformation**
10:35	Chair's welcome: **Richard Bray**, Cancer Research UK & Charity Tax Group	Chair's welcome: **Penny Wilson**, governance consultant	Chair's welcome: **Tristan Blythe**, *Charity Finance*	Chair's welcome: **Diane Sim**, *Charity Finance*	Chair's welcome: **Ian Allsop**, *Charity Finance*
10:40	**1A.The SORP shake up: what the latest update means for your charity** The first accounting periods under the new Charities SORP and FRS 102 are imminent, bringing key changes that will shape how charities report and communicate their impact. This session will unpack the most important updates, including the new three-tier structure, changes to revenue recognition, lease accounting and the trustees' report, and offer practical guidance on how to prepare with worked examples. **Steve Harper**, partner and head of social purpose, HaysMac	**1B. Trustee governance challenges, rising risks and how to stay ahead** Volunteering to lead a charity should be rewarding, but today's trustees face tighter regulation, shifting operating environments and an increasingly litigious culture. Legal specialists from VWV's charity law and governance team will offer practical guidance on the intensifying demands of the role, navigating uncertainty and volatile environments, handling complaints and the growing impact of AI, and will cover the steps trustee and senior teams can take to protect themselves and their charities. **Con Alexander**, partner, VWV	**1C. Cyber Security: How to Protect your Organisation** Cyber threats increasingly target people rather than technology, and charities are no exception. In this session, Oliver Kersh of Finch Cyber will explore how modern cyber attacks work, why organisations and individuals are targeted, and the simple steps charities can take to reduce their risk. Using real-world examples, Oliver will cover common threats including phishing, account compromise and information exposed online, as well as demonstrating how attackers can use publicly available information to make their approaches far more convincing. The session will provide practical cyber security guidance that charities of any size can take away and apply within their organisations. **Oliver Kersh**, founder and principal consultant at Finch Cyber, specialising in social engineering, open-source intelligence and cyber security awareness (session sponsored by United Trust Bank.)	**1D. Charity investment policy best practice** Over the past decade, the investment landscape for charities has evolved significantly, with broader investment options, advances in sustainable and values-aligned investing, and higher governance expectations. Alongside these shifts, the Charity Commission updated its CC14 guidance in 2023, followed by the Charity Investment Governance Principles in early 2025. In response, we launched our peer-reviewed, best-practice Investment Policy Framework to support well-governed, mission-aligned decision-making. This session complements our written publication, with hard copies available on the day. Together, these materials offer a structured approach that trustees can adapt to their charity's needs. **Tom Holbrook**, portfolio director and **Tom Montagu-Pollock**, co-head of charities, Cazenove Capital	**1E. Closing the fundraising gap: how charities can use data, technology and finance insight to build sustainable income** As charities face rising costs, changing donor expectations and pressure on public funding, building resilient income streams has never been more important. This session explores how finance, fundraising and technology teams can work together to strengthen income strategies through better data, forecasting and digital tools. Learn how charities are improving donor engagement, identifying new opportunities and making more confident decisions to support long-term sustainability. **Sean Nickerson**, solution consultant, Sage Intacct
11:20	Transit time				
11:25	**2A. Navigating VAT, gift aid and corporation tax risks in fundraising platforms and third-party arrangements** This session explores the growing complexity of tax considerations in modern fundraising, particularly as charities increasingly rely on digital platforms and third-party intermediaries. With evolving HMRC scrutiny and more sophisticated fundraising models, organisations must be proactive in identifying and managing VAT, Gift Aid, and corporation tax risks. **Chris Evans**, director and **Heather Rushforth**, associate director, BDO	**2B. The practical compass – guiding investments by mission and values** This session will explain what mission-aligned investing means in practice, and why it is increasingly important for charities in terms of values alignment, risk management and long-term resilience. It will explore common challenges and trade-offs, including perceptions around returns and fiduciary duty, and set out practical first steps for getting started—such as exploring your 'impact personas', defining a strategy, exploring new opportunities, engaging trustees and taking a phased approach to change. **Hill Gaston**, head of impact strategy and advice and **Natalie Yapp**, head of endowment & foundation sales, Marsh	**2C. Forecasting the unforecastable: managing risk, income diversification and financial resilience** How do finance leaders build reliable budgets when some of the biggest income opportunities are also the least certain? In this session, hear how Full Fact has responded to funding shocks by rethinking its income model, working closely across finance, fundraising and board leadership to create more resilient forecasting processes. From weighted likelihood modelling to governance conversations around risk appetite, this practical session offers insights into balancing caution, ambition and sustainability. **Caroline Gellatly**, head of development, Full Fact	**2D. Collective decision-making for charity investments: behavioural insights and guidance for more productive discussions and outcomes** Charity trustees, leadership and finance executives bear responsibility for investments without full economic ownership. Every effort is made to make decisions for the benefit of the charity, but these decisions are largely driven by individual emotions, social context, and accountability structures. Outcomes are also judged not just on returns, but on process, prudence, and values alignment. How, therefore, should charity's address these challenges without succumbing to behavioural biases that could undermine their investment and sustainability objectives? **Alex Joshi**, head of behavioural finance, Barclays Private Bank	**2E. Why transformation fails charities and how to get it right** In most cases, digital transformation doesn't fail because of technology. It fails when key foundations aren't clearly established from the start: clear ownership, realistic resourcing, strong communication, and a shared view of what success looks like. This session will unpack how aligning people, processes, and communication is key to making successful change. Learn how to build momentum, collaborate more effectively, and build the foundations for sustained success, with practical lessons grounded in real experience. Attendees will leave with honest lessons on what to prioritise early, how to bring people with you, and how to future-proof finance without losing sight of purpose. **Megan Liles**, project manager, Xledger and **Jakina Matthews**, head of finance, MND Association
12:05	Transit time				

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AFTERNOON SESSIONS

12:10	**3A. Employment tax compliance in a changing labour market** This session will explore how the recent introduction of the Fair Work Agency may impact National Minimum Wage reviews and HMRC's most recent approach. Attendees will gain a clear understanding of key aspects of National Minimum Wage, HMRC's approach, common errors and tips for avoiding potential pitfalls. This will be followed by HMRC's approach to employment status, the keys differences between employment and self-employment, and the tests to apply to determine employment status given the growing complexity of compliance and risk management. The session highlights practical implications for employers, including record keeping requirements and the impact of the wider labour market reforms such as the joint and several liability legislation, introduced in April 2026. The session should help attendees provide with insights to strengthen governance, and ensure employment tax and NIC positions remain robust, compliant and aligned with organisational strategy. **Caroline Jones**, head of employment taxes, Albert Goodman	**Room closed**	**3C. The hidden cost of carbon** Your organisation's biggest climate impact may not be immediately obvious—and it may sit within your finances. This session will explore the case for urgent action on finance emissions, from banking to pensions and investments. Drawing on two finance leaders' practical experience, we'll show how organisations can uncover hidden carbon, reduce exposure to future risk, and ensure financial decisions support—not undermine—net zero commitments. **Ben Clarkson**, chief finance and operating officer, Parkinson's UK and **Ruth Jenkins**, finance director, Keep Britain Tidy	**3D. Financial resilience and investment strategy** Financial management and investment strategy are critical to long-term organisational sustainability. This session explores current trends in third-sector finances, reserves planning, and annual review processes to ensure investment approaches remain aligned with charitable objectives. We will examine the differences between pooled fund investments and bespoke discretionary strategies, helping trustees understand which structure best suits their organisation's needs, ethical principles, and specific income or cashflow requirements. **Ed Caswell** and **Paul Mathias**, RBC Brewin Dolphin	**3E. From automation to impact: how AI and agents are transforming charities** Explore how AI and autonomous agents are moving charities beyond efficiency gains into measurable impact. This session will unpack practical use cases, from intelligent automation of finance to agent-led decision support, showing how organisations can free up capacity, improve accuracy, and scale outcomes. Attendees will learn how to evaluate AI opportunities, manage risk and governance, and build a roadmap that aligns technology with mission. We'll also share real-world examples of charities using AI to enhance insight, optimise resources, and strengthen stakeholder trust. Expect clear guidance on where to start, how to prioritise investment, and how to demonstrate tangible impact, so your organisation can move from experimentation to meaningful, mission-driven results. **Daniel Booth**, lead pre-sales engagement consultant, mhance
12:50	Lunch, networking and time to visit exhibition				
13:55	**4A. Structured business risk review – how to successfully navigate your HMRC review** HMRC is increasing its use of structured business risk review meetings with Charities, making it essential that you are fully prepared and confident in how you engage. In this practical session, we will walk you through what to expect and how to respond effectively at each stage – before, during and after the review – so you can manage risk, present your processes clearly avoiding unnecessary challenges. You will leave with straightforward, actionable steps that help you stay in control and demonstrate strong compliance. Register now to ensure you are ready for your next HMRC interaction. **Parul Anand**, partner and **John Angood**, principal, BDO	**4B. Panel – From numbers to narrative: strengthening finance–board communication** Effective board communication is more than accurate reporting – it's about insight, clarity, and influence. This session explores how finance directors can move beyond spreadsheets to tell a compelling financial story that resonates with non-financial trustees and supports better decision-making. We'll cover practical approaches to framing risk for risk-averse boards, highlighting what really matters, and ensuring trustees have the confidence and understanding to engage with and act on financial information. **Anupam Ganguli**, finance director, Historic Royal Palaces, **Rajit Gholap**, director of finance, governance and technology, Prostate Cancer UK, and **Felicia Willow**, governance consultant and interim CEO, Willow Charity Consulting	**4C. Risk & reward: rethinking cash strategy** In an evolving financial landscape, charities are under increasing pressure to make every pound work harder. This session explores how organisations can move beyond simply safeguarding cash under FSCS protection, towards a more strategic treasury approach—balancing security, liquidity, and return to support long-term mission impact. **Giles Hutson**, co-founder, Insignis Cash	**4D. The US midterm elections... the sneeze or the cure?** In November, all 435 members of the United States' House of Representatives and 33 members of the 100 seat US Senate are up for election. The results will shape the remainder of Trump's presidency both domestically and internationally. Why are these elections important to investors? How might policy disruption or a strengthened opposition affect the economy? How have equity markets responded to previous midterm elections and what sort of political noise and volatility should charity investors expect in the run up and the aftermath? **Arielle Ingrassia**, associate director investment specialist – investment strategy team, Evelyn Partners	**4E. AI in charity finance: from caution to confidence** Drawing on insights from charities' responses to AccountsIQ's annual CFO Mindset Report, this session explores how finance leaders are approaching AI and automation in their day-to-day work. It considers the sector's unique challenges and the natural caution around adopting new technologies, while highlighting how AI can streamline workflows, speed up routine tasks, and reduce errors. The session also shows why starting small and scaling gradually is often the most effective approach, alongside the need to prioritise compliance, security, and explainability when integrating AI into charity finance. **Elaine Birch**, content and comms manager, AccountsIQ
14:35	Transit time				

Continued overleaf

> "Excellently organised, interesting seminars and thought-provoking conversations."
>
> Pippa Townly, RNLI

> "Good blend of information, interesting stands and networking amongst peers."
>
> Andrew Wimble, D'Oyly Carte Charitable Trust

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AFTERNOON SESSIONS

14:40	**5A. Managing your reserves – how to calculate, discuss and report on your reserves** As funding becomes tighter across the sector, and reporting requirements change, understanding the level of reserves that you hold and knowing how to have the discussion with your board and funders becomes increasingly important. This session will go through the ways to calculate what reserves you have, the importance of a good reserves policy and getting board buy-in as well as how you present that information to your funders to achieve the best outcome. **Michelle Ferris**, partner and head of charities, Albert Goodman	**5B. Telling your finance story** Small and medium-sized charities face increasing expectations to demonstrate both financial stewardship and impact. Yet finance reporting is often seen as a compliance exercise rather than an opportunity to engage supporters, funders and trustees. This session explores how charities can move beyond statutory accounts to tell a clear and compelling financial story. Through practical examples and accessible approaches, we'll examine how transparent communication can build trust, demonstrate impact and strengthen confidence among donors, grant-makers and other stakeholders. **Liz Pepler**, director of finance, Civic Power Fund	**5C. The legacy opportunity: accounting, forecasting and risk** An unprecedented intergenerational transfer of wealth is creating major opportunities for charities to grow legacy income – but also new challenges for finance leaders managing an unpredictable income stream. This session will explore evolving SORP guidance, inconsistencies in legacy recognition, and the practical challenges of forecasting, risk and reserves management. Bringing together finance and fundraising perspectives, it will examine how charities can better manage volatility while maximising the legacy opportunity. **Paul Browne**, head of professional standards, Institute of Legacy Management and **Anaish Yilma-Parmar**, head of legacies, British Red Cross	**5D. To infinity...and beyond market cap!** In this session, we explore how systematic investing brings order to the toy box by targeting proven factors: Value as the bargain-hunting Woody, Quality as the dependable Buzz, Momentum as Jessie riding the trend, and Low Volatility as Rex cautiously approaching market scares. But the real magic happens when the gang works together – combining factors into a diversified multi-factor strategy designed to navigate changing markets with discipline, balance, and a little Pixar-style teamwork. **Raj Shah**, senior quantitative and factor strategist, L&G	**5E. What your finance system should be doing (but probably isn't)** Charity finance has evolved from back-office reporting to a strategic driver of organisational performance—yet many systems haven't kept pace. This session explores the gap between what modern finance platforms can deliver and what most charities experience day to day. We'll highlight how leading organisations are moving beyond spreadsheets, manual reporting, and disconnected systems towards real-time insight, integrated data, and automation. The focus is not just efficiency, but enabling better decisions, stronger governance, and clearer impact reporting. Attendees will leave with a practical framework to assess current finance capability, identify where value is being lost, and understand what's possible—from joined-up fundraising and finance to data-led decision-making. **Nicole Hill**, BC product specialist and **Dan West**, non-profit solutions sales consultant, ForGood.Tech
15:20	Networking & refreshment break				
15:45	**6A. Preparing for the future of employment taxes** The employment tax landscape is undergoing significant change, with new rules and expectations reshaping how organisations manage compliance. This session will explore the evolving framework of Employment Tax and National Insurance, with a particular focus on the upcoming payrolling of benefits regime set to take effect in April 2027 but also what to expect from HMRC in respect of employer compliance reviews. Consideration will also be given to recent case law, especially the decision in PGMOL v HMRC and what lessons Charities and NFPs should take from this case. The session will help prepare delegates for a significant change in your employment tax obligations. **Nick Bustin**, director, head of employment tax, HaysMac	**6B. Are your financial messages helping or harming your people?** In the current economic climate, many charities are operating under considerable financial pressure and these stresses inevitably surface in internal conversations. While transparency about finances is important, emerging evidence suggests that how organisations communicate about financial difficulties can profoundly shape the mental health and wellbeing of employees – especially in sectors where emotional labour is high and remuneration comparatively low. This session will explore some practical techniques to support and strengthen your internal communications, demonstrating that financial transparency doesn't have to compromise mental health. **Boston Mwense**, finance and support director, Blesma	**Room closed for change of layout**	**6D. Mission-Aligned Investing: Practical Tools for Charity Trustees and Finance Leaders** How can charities align their investments with their mission while meeting financial objectives? This session explores practical approaches to mission-aligned investing, including portfolio screening, thematic investments, stewardship, ESG integration and impact investing. Attendees will gain actionable insights on governance, investment policy, net zero considerations, and measuring impact, helping trustees and finance teams make informed decisions that support both long-term resilience and charitable purpose. **Christophe Borysiewicz**, Senior Investment Director, Charities, Rathbones	**6E. Unlocking sustainable income in challenging times** Sustainable income doesn't happen by chance – it's built over time through intentional growth and learning. In this session, we'll share how an entrepreneurial, purpose-driven approach is helping MYTIME Young Carers move towards a more sustainable income model, including early steps to scale its schools programme. We'll explore what it means for finance leaders to adopt a 'start-up' mindset at an early stage, and how this evolving approach can support organisations to build resilience and lay the foundations for long-term, sustainable income. **Krista Cartlidge**, chief executive, MYTIME Young Carers
16:25	Transit time				
16:30	**Final reflections & networking reception: insights, highlights, and connections** Don't rush off just yet – join us for the final session of the day as our stream chairs come together for an engaging wrap-up conversation. This is your chance to hear key insights, standout moments, and cross-cutting themes from across the conference – all brought together in one dynamic discussion. Whether you're looking to consolidate your learning, share reflections, or connect with peers, this session offers a thoughtful close to the day's conversations. Plus, with drinks, nibbles, and a relaxed networking atmosphere, it's the perfect opportunity to wind down, exchange ideas, and leave inspired. Chaired by **Jenni O'Donovan**, events director, Civil Society Media				

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