



Citizens Advice Richmond is looking for a trustee treasurer



What will you do?

- oversee the finances of a vibrant charity supporting Richmond residents.
- read papers for board meetings and attend six board meetings per year in addition to leading on any Finance Committee meetings to discuss finances in more detail.
- explain, guide and advise the board on the key assumptions and financial implications of the budgets, operational and strategic plans.
- you will oversee provision of quarterly accounts financial forecasts for the current and future years at board meetings.
- direct and support the work of the paid finance officer (an independent contractor).
- ensure quarterly financial returns to National Citizens Advice are made on a timely basis.
- you will be a key user of the organisation's banking system, providing second approval for payments including monthly payroll and bi-monthly BACS run.
- you will chair the finance sub-committee and play an active role in the HR and premises sub-committees providing appropriate financial perspective.
- You will work closely with the CEO when setting the annual budget.
- ensure that the organisation has an appropriate reserves policy
- present accounts at the Annual General Meeting (AGM) in an accessible way for volunteers, staff and stakeholders
- ensure that annual accounts are prepared in compliance with SORP (Statement of Recommended Practice) Accounting for Charities and submitted by the deadline to the Charity Commission and/or Registrar of Companies, and make arrangements for them to be Independently examined as required.

- keep the board informed about its financial duties and responsibilities.
- understand the accounting procedures and key internal controls. Be able to assure the board that the charity's financial integrity is sound.
- contribute to the overall strategic direction of the organisation.



What's in it for you?

- make a positive impact for people in your local area by ensuring Richmond Citizens Advice is sustainable and meeting the needs of the community.
- meet people and build relationships with trustees, staff and other volunteers.
- build on your governance, leadership and strategy skills.



What do you need to have?

You'll need to:

- understand and accept the responsibilities and liabilities as trustees.
- have financial qualifications or relevant experience.
- past experience of overseeing the finances and contributing to the overall management of an organisation with an income of at least £500k
- knowledge or experience of charity finance would be helpful but is not essential.
- be non-judgmental and respect views, values and cultures that are different to your own.
- have good listening, verbal and written communication skills.
- be able to exercise good independent judgment and if necessary to make difficult recommendations.
- be able to explain complex financial information in an accessible way.
- be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection.
- be willing to undertake training in your role.



How much time do you need to give?

You will need up to one day a week for the regular activities, but this will vary according to the quarterly reporting and other factors.

Trustee boards usually meet in the evenings, and you'll likely need to give 12-15 hours per year to attend these. Sub-committees meet quarterly and a further 4-6 hours per year are required for these.

Valuing inclusion



Our volunteers come from a range of backgrounds and we particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from Black Asian Minority Ethnic (BAME) communities.

If you are interested in becoming a trustee and would like to discuss flexibility around location, time, 'what you will do' and how we can support you please contact us.



Contact details

Please contact Lorna Reid on 0208 891 2145 or lorna.reid@citizensadvice-richmond.org for a chat about the role.

To apply, please complete our application form and indicate that it is the trustee treasurer role you are interested in, many thanks

<https://www.citizensadvice-richmond.org/get-involved/volunteering/become-a-trustee-2/>