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Working with Point North

A guide for professional advisers



Professional advisers are often part of conversations about how clients can support the causes and communities that matter to them.

Point North is the community foundation serving County Durham and Tees Valley.

We help people and businesses support local charities and community organisations, with a mission to fight poverty and enrich lives.

We work alongside professional advisers when clients want to give locally.

You provide legal, financial or tax advice; we help you and your clients explore local needs and giving options, then manage the charitable funding.

How we help

We help you and your client:

- Identify local organisations and funding opportunities.
- Consider an approach that reflects their wishes and timescale.
- Organise giving without establishing a separate charity.
- Manage grant assessment, due diligence and payments.
- Understand what their funding has supported.

When to involve us

Speak to us when your client is:

- Thinking about giving for the first time and wants to understand their options.
- Considering a significant donation or a gift in their will.
- Selling a business and exploring local giving.
- Unsure which organisations to support.
- Involving family members in giving.
- Giving in memory of someone.
- Planning charitable support over time.

Giving options

Clients can make one-off or regular donations, establish a Named Fund or leave a gift in their will. A Named Fund supports an agreed charitable purpose through Point North, with opportunities for donors and family members to participate in grantmaking.

We can discuss funding work in the near term or investing an endowment to support grantmaking over time. Clients can also give shares, property or other assets.

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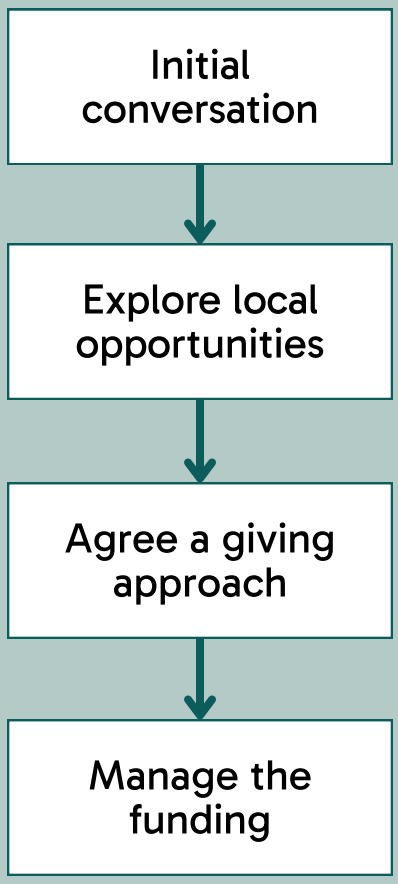
How we work with you

Start with a conversation
You can have an initial, no obligation conversation with us any time, and you can discuss a situation without identifying your client. Speak to us first or arrange a joint call or meeting. We follow up with relevant written information or a summary of options.

Explore local opportunities
We discuss what the client wants to support and introduce relevant work across County Durham and Tees Valley.

Agree the approach
We explain the proposed arrangement, donor involvement and contribution to Point North's operating costs. For Named Funds, the terms are recorded in a fund agreement.

Manage the funding
We assess applications, award grants and report on the work supported. We agree how you and your client will remain involved.



How we look after charitable funds

Assessment and monitoring
Our team assesses applications and carries out due diligence, including safeguarding checks. We monitor grants and collect reports on how funding has been used.

Investment oversight
Our Board set and regularly reviews our cash and investment policy. Endowment funds are invested through carefully selected investment managers with an emphasis on ethical and sustainable investment.

Governance and administration
Management of charitable funding so the process remains straightforward and fair, supported by our strong governance structure.

Statements and impact
Fundholders receive quarterly statements showing balances, grants, investment movements where applicable and agreed contributions to operating costs.

Speak to us



Jane Reynolds

If you're an adviser based in Tees Valley get in touch with Jane.

JaneR@pointnorth.org.uk



Sarah Cairns

If you're an adviser based in County Durham or further afield, get in touch with Sarah.

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