

Charity Financials for Legal Advisers

Charity Financials is an online database tool covering over 162,000 not-for-profit organisations made up of registered and exempt charities, independent schools and universities with benchmarking capabilities for both charities and advisers.

What Charity Financials can offer you

- Full financial search on the largest 5,000 charities in the UK, 160 universities and 800 independent schools
- Adviser data and adviser history data covering the last 10 years
- Detail of client movement; lists of previous legal advisers for new clients, and listings of the named firm lapsed clients have gone to
- Benchmarking functionality, calculate market share of client income and related ranking amongst all other legal advisers

Take a look inside

Search functionality includes financial, causal and geographical parameters enabling you to hone in on charities which fit your target market. You can create bespoke “shortlists” which represent specific areas of interest.

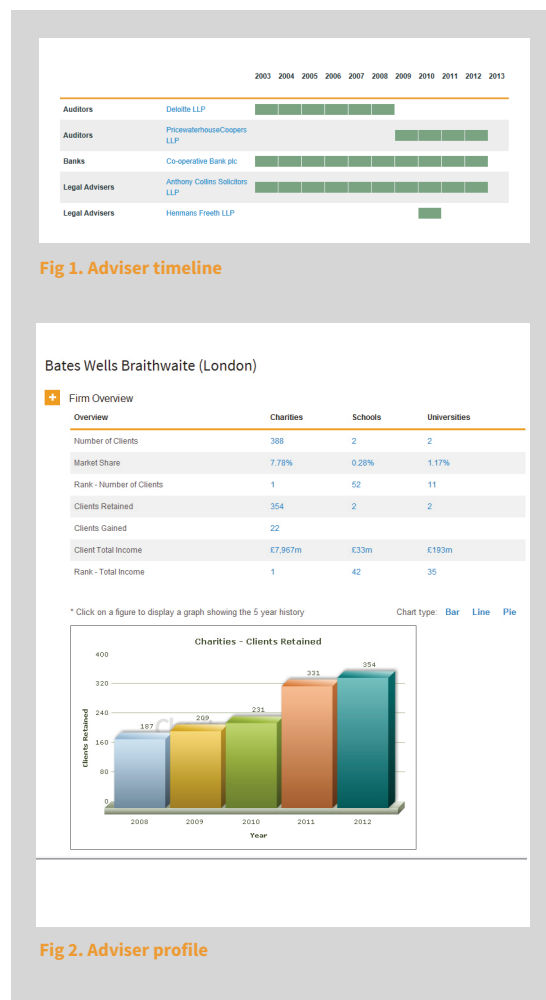
Legal advisers can search for clients advised by any named legal firm. All columns in the results lists are sortable and all results including contact names can be downloaded to excel.

Adviser timelines on charity profiles show the adviser history for any charity identifying how long any particular adviser has held a mandate but also show when a charity has changed adviser (see figure 1).

Adviser profiles

The adviser pages are interactive and allow you to identify key client statistics by monitoring the number of clients, number retained gained and lost, ranking amongst other legal firms and graphical representations of this data covering the last five years (see figure 2).

Each adviser entry lists all current clients but also identifies those clients gained and the legal firm which they were gained from (see figure 3) and conversely the same for lapsed clients naming the current legal adviser.



Clients Won

| | Previous Advisers | Total Income | Year End | Type |
|--|---|--------------|------------|---------|
| Anna Freud Centre | Goodman Derrick LLP; Paul Weiss Rifkind Wharton & Garrison | £4.238m | 31/08/2011 | Charity |
| Barrow Cadbury Trust | Russell-Cooke; Stone King LLP | £2.656m | 31/07/2012 | Charity |
| Breast Cancer Campaign | Bircham Dyson Bell LLP | £12.039m | 30/06/2011 | Charity |
| British Association for Adoption & Fostering | RadcliffeLeBrasseur | £7.698m | 31/03/2012 | Charity |
| British Film Institute | Bircham Dyson Bell LLP; Farrer & Co LLP; K&L Gates; Maurice Turner Gardner LLP | £48.453m | 31/03/2011 | Charity |
| Christian Publicity | Miller Paris | £2.735m | 30/04/2011 | Charity |
| Elizabeth Finn Care | Farrer & Co LLP; Henmans Freeth LLP; Russell-Cooke; Wilsons Solicitors LLP | £24.478m | 31/03/2012 | Charity |
| Henry C Hoare Charitable Trust | Hunters | £0.193m | 30/09/2011 | Charity |
| Jewish Care | Henmans Freeth LLP; IBB Solicitors; Stephenson Harwood; Stone King LLP; Wilsons Solicitors LLP; Withers LLP | £48.375m | 31/03/2012 | Charity |

Fig 3. Clients won

Adviser benchmarking capability

Adviser benchmarking allows firms to compare each other over a timeframe enabling you to make comparisons on rankings or values of fees or calculated market shares.

Benchmarking allows you to choose firms to compare and then select data to be compared and show this data over time for competitor analysis to aid internal market development strategy (see figure 4).

Bates Wells Braithwaite (London)

Firm Overview

| Overview | Charities | Schools | Universities |
|--------------------------|-----------|---------|--------------|
| Number of Clients | 388 | 2 | 2 |
| Market Share | 7.78% | 0.28% | 1.17% |
| Rank - Number of Clients | 1 | 52 | 11 |
| Clients Retained | 354 | 2 | 2 |
| Clients Gained | 22 | | |
| Client Total Income | £7,967m | £33m | £193m |
| Rank - Total Income | 1 | 42 | 35 |

* Click on a figure to display a graph showing the 5 year history Chart type: Bar Line Pie

| Year | Clients Retained |
|------|------------------|
| 2009 | 209 |
| 2010 | 231 |
| 2011 | 331 |
| 2012 | 354 |

Fig 4. Benchmarking

Want to know more?
Call us now on 020 7324 2364
www.charityfinancials.com

