



## The Dean Trust

The Dean Trust brings together four schools in Trafford and Knowsley who have a shared vision of excellence. They were looking for a partnership with Hallidays, not just a professional adviser.

### Before

- ✘ As they had a fixed budget, the trust wanted assurance they would know how much they were paying in advance.
- ✘ The trust was looking for someone who would get to know them and their schools, who understood the challenges they faced and could offer support as they underwent huge changes.
- ✘ There were uncertainties about the risks involved in converting schools into academies and ensuring that these risks were identified.

### After

- ✔ We agreed our fees up front so the trust knew exactly what they were going to be paying. Any additional work was quoted for in advance, giving them control of where they chose to spend their money.
- ✔ The financial team at the Dean Trust were impressed by our keenness to build a working relationship and understand their challenges. Our support included regular meetings to tie in with trust board meetings, as their needs were very different to that of the management team.
- ✔ Hallidays offered a free VAT and PAYE review, which ensured from the start that any risks were highlighted and mitigated.

## Outcome

The Dean Trust are confidently moving forward with their strategic goals.

Hallidays are able to give ongoing proactive advice to ensure they are secure in the knowledge that their strategy doesn't come with unanticipated regulatory risks.

Hallidays' VAT specialist has also given advice around the structure of the Trust's newly acquired status as a provider of School Centred Initial Teacher Training (SCITT). This has helped them to effectively manage the impact of VAT on the SCITT and the Trust.

## What the client said

“The importance of understanding our business and Hallidays keenness to build a working relationship resulted in a unanimous decision by the selection panel. We definitely didn't just want a professional adviser - we wanted a partnership.”



Nick David  
Chief Finance Officer - The Dean Trust