Finance Trustee Role Description

About the Role

At Age UK Bradford District, our Trustees are dedicated, community-minded individuals who use their skills and experience to improve the lives of older people. As both Trustees and Company Directors, they share responsibility for ensuring the charity is well-governed, financially sustainable, and focused on achieving its mission.

Being a Trustee is a rewarding opportunity to make a difference, contribute your expertise, and develop strategic leadership skills. Trustees shape our long-term direction, oversee performance, and hold the organisation accountable, while the Chief Executive and team manage day-to-day operations.

Finance Trustee Overview

The Finance Trustee plays a key role in providing financial leadership and oversight, ensuring robust financial management, compliance, and transparency. Working alongside our Finance Manager and senior team, the Finance Trustee supports the Board in maintaining the charity's financial health and sustainability.

Key Responsibilities

In addition to the general duties of a Trustee, the Finance Trustee will:

- Provide financial insight and guidance to the Board and Senior Management Team
- Oversee budget planning and presentation to the Board
- Review management accounts, cashflow, and annual financial statements
- Ensure financial resources meet current and future needs
- Support and monitor Finance Policies and Procedures, including reserves and investments
- Ensure compliance with Charity Commission and Companies House requirements
- Advise on the financial implications of strategic plans and risks
- Chair the Finance Committee (from October 2026) and ensure sound financial controls

- Monitor financial risks and recommend mitigation strategies

Time Commitment

- **Board meetings:** ~6 per year (2 hours each)
- **Finance Committee:** ~6 per year (1 hour each)
- **Preparation:** Reading papers and reports in advance
- **Additional:** Occasional strategic or planning sessions

Person Specification

We're looking for someone who brings both financial expertise and a genuine commitment to supporting older people. You'll ideally have:

- Experience in finance, accounting, or strategic financial oversight
- Understanding of charity finance (or willingness to learn)
- Integrity, sound judgment, and independence of thought
- Strategic and analytical thinking
- Strong communication and teamwork skills
- Commitment to Age UK Bradford District's values and mission

Why Join Us

As a Trustee, you'll help shape the future of a respected local charity, ensuring older people in our community receive the support they deserve. You'll also gain valuable experience in governance, strategy, and leadership while contributing to meaningful, positive change.

Further Information

We encourage Trustees to make use of online resources that support good governance and continuous learning:

The legal duties of trustees | NCVO

Charity trustee: what's involved (CC3a) - GOV.UK

The role of the trustee in a charity | Factsheets | IoD

Become a trustee | Reach Volunteering

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