

LRU3A – TREASURERS’ PEER SUPPORT GROUP
MEETING – 27th January 2026, 16.00, on Zoom

Join Zoom Meeting (recurring invite):

<https://us02web.zoom.us/j/85941949778?pwd=ZytYSmw4T3llenp2UWtpYzFEWWFHUT09>

Meeting ID: 859 4194 9778

Passcode: 319680

ATTENDEES:

No	u3a NAME	REP NAME		Att	Apol
1	Abbeywood & Thamesmead	Pat	Stratful		
2	Barnet	Johannah	Fischer		
3	Beckenham	Lynn	Edwards		
4	Bexley	Luigi	Lipparelli		
5	Bromley	Gary Jon	Chin Pearce	1	
6	Crouch End & District	Paul	Smith		
7	Croydon	Barry	Morris		
9	Dulwich & District	Keith	Ball		
10	Ealing	Liz	Major	1	
11	Enfield	??			
12	Hackney	Annie	Nehmad		
13	Hammersmith and Fulham	Derek	Hodd		
14	HGS	Simon	Freeman (SF)		
15	Harrow	Anne	Banks		
16	Havering	Graham	Lyons		
17	Hillingdon	Jasia Barbara	Zimmerman Hall	1	
18	Hounslow	Rob	Woods		
19	Islington	Robert Derek	Tench Harwood (DH)	1	1
20	Kenton & District	John	Bishop		
	Kingston	Chris	Cheek		
	London SE	Rod	Press		
	Merton	Ruth	Cooke		
	Mill Hill	Melvyn Jill	??? Haistead		
	Newham	Mairie	Christie		
	North London	Stewart	Maugham		
	Northwood & District	Alan	Morris	1	
	Norwood	Lindi	Kibbey (LK)	1	
28	Orpington	Bob	Browne (BB)		
29	Palmers Green & District	Tony	McNamara		1
30	Redbridge	Maurice Elaine	Neiberg Mitchell		
31	Richmond upon Thames	John	Cardwell		
32	Sidcup	Georgina	Self	1	
33	Stanmore District	Martin	Carr		
34	Sutton & District	Chris	McCarthy		
35	Tower Hamlets	Dymphna	Dale		
36	u3a in London	Anthony	Sober		
37	Upminster	Malcolm	Henderson-Begg		
38	Waltham Forest	Christine	Sherret		
39	Wandsworth	Penny	Ryan		1
40	Wanstead & Woodford	Diane	Conway		
41	Welling	Jan	Pitchell		

AGENDA:

1. Previous Actions
2. Gift Aid update
3. National Facebook Treasurers Forum
4. Standard Formats
5. CC8
6. Anything else / open discussion / AOB
7. Next meeting date

Several new Treasurers attended and were welcomed.

SUBJECTS:

1. **Previous Actions:**
None outstanding
2. **Gift Aid Dispute (Trust vs HMRC):** Background - Haysmacintyre (previous auditors) were contracted to represent the Third Age Trust regarding rejected u3a submitted Gift Aid claims. Some Sports Associations have been flouting the regulations hence now HMRC are scrutinising other similar situations. Letters exchanged, meetings held with HMRC. HMRC's stance is that part of some u3a's claims are for 'personal benefit' or 'teaching' activities and hence should be subtracted from the claimed total. Their definition of 'personal benefit' or 'teaching' is obscure. **Discussions have now been concluded, with no resolution.**
u3as should hence carry on as previously, following the Trust's guidance on the national website: [Gift Aid Guidance](#).
3. **National Treasurers Forum:** A reminder that to sign up contact Sue Russell at sue.russell@u3a.org.uk. Some interesting help' topics are posted there.
4. **Annual Accounts templates (one for presentation to their Executive Committee and one for the Charity Commission):** DH is collating samples of these to then be available for all. Anyone wishing to provide theirs should send it to DH. General discussion re the CCs further requirements these days for more information eg a Charities Policies status. A standard 'MS Excel' based Accounts template is already available.
5. **CC8:** this is one of the new CC requirements. All charities are supposed to use and complete this financial controls health check list. The CC's version is extensive and seems to have been created for large charities. Th Trust's Finance Committee has created a simplified version that u3as might prefer to use. It can be found on the national website here: [Finance Health Checklist](#)
6. **Open Discussions:** there was nothing else arising.
7. **Topics for Next Meeting:** DH asked that ideas be submitted to him, but also advised that if there are any problems arising, or any queries in the interim, these be emailed to DH at any time.

Actions arising: none.

Next Meeting(s): meetings will be, every 3 months generally on the 4th Tuesday of the month, at 4.00pm. The next meeting is **Tuesday 28th April 2025, 4.00pm.**

All of these meeting Notes are posted on the LRU3A website, on the Peer Group webpage:

<https://lru3a.u3asite.uk/peer-support/>