

Yolande Wan

Legal Counsel and Senior Trust Manager

Experience

Legal Counsel & Senior Trust Manager at Trusts

July 2015 - Present (1 year 9 months)

Trust Manager at Trust and Fiduciary

2014 - June 2015 (1 year)

Trust Manager at Great St Helen's Trust

August 2005 - September 2012 (7 years 2 months)

Ensure legal compliance by the trust and trustees, company secretarial duties, governance and research, ensure timely filing of trustees report, accounts and Annual Returns with the Charity Commission and Companies House, advise Companies House and Charity Commission on any changes, advise and inform director trustees where necessary regarding risk, compliance, insurance, corporate governance, ensure appropriate insurances are in place, ensure that appropriate banking and accounting procedure and practice are in place, organising of trustees' meetings, taking and preparing of minutes, oversee purchase, sale, lease and maintenance of trust assets, peruse and negotiate terms of agreement, liaise and instruct external lawyers, liaise with auditors and HMRC, maintain accurate sets of records, ensure data protection, accounts, administration of gift aid system, carry out tax claims and liaise with auditors on annual accounts, identify tasks and ensure that necessary actions are taken, reply to correspondence and any ad hoc duties.

Skills & Expertise

Business Strategy

Change Management

Strategy

Strategic Planning

Research

Management

Business Process Improvement

Project Management

Data Analysis

Analysis

Corporate Law

Education

Queen Mary, U. of London

Master's Degree, Banking and Finance Law, 2012 - 2013

University of Waikato, New Zealand

LL.B & BMS, Law and Economics

Activities and Societies: The Law Society of England and Wales

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[Contact Yolande on LinkedIn](#)