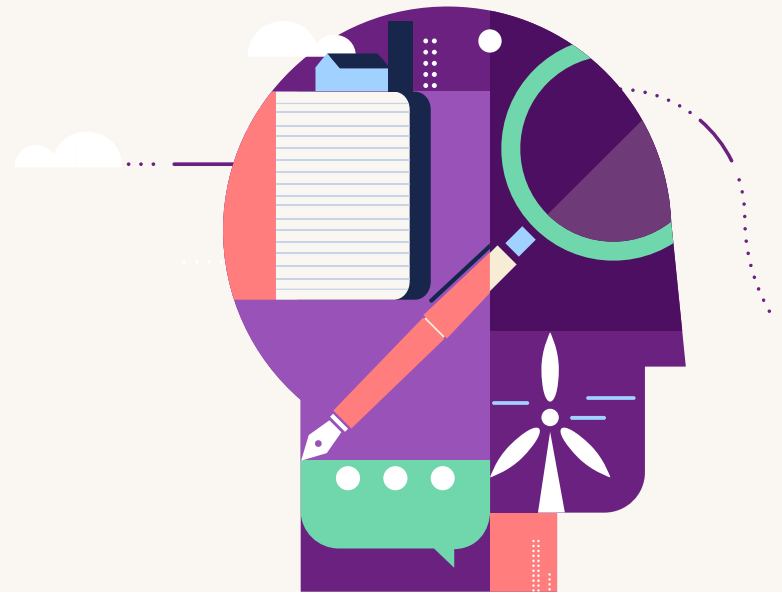


Tuesday 3 November 2020

Trustees Week Alliances and Mergers

Alastair Keatinge and
Kirstine Ferguson



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- Why Alliances/Mergers-role of Trustees
 - Covid19- less funding, need for long term sustainability
 - Alliances/Joint Working/Partnership Working/Collaboration
 - Various Legal Models/Need for Collaboration Agreement/MoU/Heads of Terms
 - Merger Process-options to Structure/OSCR and other Consents
 - Merger Checklist-Due Diligence/Pension Issues
 - Duty of Trustees



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- Case Study
 - Summary-governance/lessons/questions
 - Kirstine Ferguson
 - Questions for Kirstine
 - General Questions/Observations
 - Discussion
 - Close



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