

# Criteria to list as an Advisor on the Good Finance Directory Tool

## Who would be the account owner of this profile?

We need the name and email address of one person at your organisation who will be responsible for managing your advisor listing. Responsibilities include:

- Providing the required information for the listing
- Creating a showcase story to help demonstrate how you've previously helped a charity or social enterprise with your services
- Keeping links, branding, imagery and descriptions up to date
- Liaising with whoever is responsible for communications at your organisation to spread the word via digital marketing channels

## Do you provide support for charities and social enterprises?

We need to know that your services include dedicated support for charities, social enterprises and community businesses, given that they are the core user group of Good Finance. Please provide a link that shows where this is demonstrated on your website.

## How many years' experience does your organisation have in working with charities, social enterprises, community businesses, or other social purpose organisations?

We won't publish this (unless you would like to include it in your profile description!) but need to understand your length of operation so we can be confident in sign-posting to your services. If you are less than a year old, we might need some further information to list you on the directory.

## Do you have professional indemnity insurance?

This is a requirement to list on the Good Finance Advisor Directory. Please get in touch if you'd like to discuss this.

## Have you supported a social purpose organisation in the last 6 months?

We'd like to list organisations that are regularly providing services to social enterprises, charities and community businesses. We understand that things happen, so if there's a reason you haven't been able to provide this information, please let us know.

## What's your legal structure?

We need to know the legal structure of your organisation for our internal monitoring purposes.

## Are you able to post the Good Finance logo on your website?

We'd love it if you could include our logo on your website wherever you deem appropriate. This can link to our homepage or directly to the Good Finance Directory

## What are the Filters?

Users will be able to filter their search via the following categories.

1. **The support provided by advisors (Choose any that apply – maximum of 3):**
  - Business Planning and strategy

- Legal support
- Financial management
- Impact practice
- Marketing and communications
- Technical: website, data
- Operational
- Diversity, equity and inclusion
- Dedicated support for diverse organisations
- People: HR recruitment, Interim management
- Leadership and personal development
- Research and Design
- Enterprise Development
- Raising social finance

**2. The type of organisation you are**

- Incubator / accelerator
- Skills or training programme
- Social Issue network
- Membership network
- Capacity Building
- Social Investor with dedicated advisory service
- Grant funder with dedicated advisory service
- Individual Consultant
- Other

**3. Your location:**

- East Midlands
- East of England
- London
- North East
- Northern Ireland
- North West
- Scotland
- South East
- South West
- Wales
- West Midlands
- Yorkshire and the Humber
- UK-wide

If you think your organisation doesn't fit into one of the categories above or that we are missing any organisation types, please email [aconstable@goodfinance.org.uk](mailto:aconstable@goodfinance.org.uk) with the details.