

THE QUEEN'S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST

England & Wales · Charity number 1011420

Details

| | |
|-------------|---|
| Other names | THE GURKHA TRANSPORT REGIMENT TRUST FUND, THE QUEEN'S OWN GURKHA TRANSPORT REGIMENT TRUST |
| Status | Registered |
| Legal form | Trust |
| Registered | 1992-05-27 |
| Register | View on the Charity Commission register |

Contact

| | |
|---------|---|
| Address | The Independent Services Agency Ltd Po Box 314 West End Woking GU24 9FA |
| Phone | 01276855825 |
| Email | isvcsagency@easynet.co.uk |

Activities

Objects: (A) THE PROMOTION OF THE EFFICIENCY OF THE REGIMENT AND THE MAINTENANCE OF ITS HISTORY, TRADITIONS AND ESPRIT DE CORPS. (B) THE PURCHASE OF CHATTELS AND SUCH OTHER PROPERTY AS IN THE OPINION OF THE MANAGING TRUSTEES IS FOR THE BENEFIT OF THE REGIMENT OR OF ANY UNITS FOR THE TIME BEING OF THE REGIMENT AND THE INSURANCE AND UPKEEP OF ANY PROPERTY FOR THE TIME BEING BELONGING TO THE REGIMENT OR ANY SUCH UNIT. (C) OTHER CHARITABLE PURPOSES PROMOTING THE EFFICIENCY OR ESPRIT DE CORPS OF ALL THE RANKS OF OR SERVING WITH THE REGIMENT - INCLUDING WITHOUT PREJUDICE TO THE GENERALITY OF THE FOREGOING THE PROVISION OF RECREATIONAL FACILITIES AND AMENITIES NOT PROVIDED FOR OUT OF PUBLIC FUNDS. (D) THE RELIEF OF DISTRESS, HARDSHIP OR POVERTY AMONGST SERVING OR FORMER MEMBERS OF THE BRIGADE OF GURKHAS OR THEIR DEPENDANTS BY THE PROVISION OR APPLICATION OF SUCH MONIES WHETHER BY LOAN OR GIFT AS THE MANAGING TRUSTEES CONSIDER TO BE NECESSARY.

Activities: The charity supports the regiment financially with grants for adventurous training, chattels, accoutments & other items that are not adequately, or directly, provided for out of public funds. This contributes directly towards the maintenance of morale & enhances the efficiency of the regiment.

Classification

- **How:** Other Charitable Activities
- **What:** Armed Forces/emergency Service Efficiency, Other Charitable Purposes
- **Who:** Other Defined Groups

Geography

- Nepal

Finances

| Period end | Income | Expenditure | Assets | Employees |
|------------|---------|-------------|--------|-----------|
| 2025-03-31 | £35,094 | £42,468 | - | - |
| 2024-03-31 | £30,983 | £26,908 | - | - |
| 2023-03-31 | £28,137 | £20,157 | - | - |
| 2022-03-31 | £26,729 | £32,783 | - | - |
| 2021-03-31 | £31,703 | £7,741 | - | - |

Trustees

| Name | Role | Appointed |
|---------------------------------------|------|------------|
| Brigadier Patrick Simon Reehal MBE | | 2020-08-01 |
| COLONEL GILHAM | | |
| GENERAL COPELAND | | |
| Lieutenant Colonel Giles Sugdon QOGLR | | 2020-08-01 |
| Major Basantahoj Shahi QOGLR | | 2021-07-01 |
| Major Michael Ruocco RLC | | 2022-07-18 |
| RSM Lok Sunawar QOGLR | | 2022-12-20 |

THE QUEEN'S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST

England & Wales - Charity number 1011420

Accounts

THE QUEEN'S OWN GURKHA
LOGISTIC REGIMENT REGIMENTAL
TRUST
ANNUAL REPORT OF THE TRUSTEES
AND ANNUAL ACCOUNTS
FOR THE YEAR ENDING
31 MARCH 2025

REPORT BY THE TRUSTEES OF THE QUEEN' S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST FOR THE YEAR ENDED 31ST MARCH 2025

Background.

The original Queen's Own Gurkha Transport Regiment Regimental Trust came into being on 2nd April 1992, when the Trust Deed was formally adopted. Subsequently the structure of the Regiment changed dramatically as a result of reductions within the Brigade of Gurkhas and the withdrawal from Hong Kong.

Until 31st November 2012 the Regiment was embodied within 1, 28, 36, 66 (Fuel) & 94 Squadrons QOGLR, together with the 10QOGLR Light Aid Detachment all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and 9 Regiment The Royal Logistic Corps and other worldwide outlying detachments. Subsequently (from 1st December 2012) the Regiment re-rolled as a Theatre Logistic Regiment. It was then embodied within 1 Supply Squadron, 28 Fuel and General Transport Squadron, 36 Headquarters Squadron and 10 QOGLR LAD, all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and other worldwide outlying detachments. The recent expansion of the Brigade of Gurkhas has resulted in the Regiment gaining additional Squadrons and roles. The new Squadrons are 14 Sqn, 15 Sqn, and 94 Sqn with 31 Squadron being reformed in 2023.

Objects of the Trust

The objects of the Trust are:

- a. To promote the efficiency of the Regiment and the maintenance of its history, traditions and esprit de corps.
- b. To purchase such chattels and other property as is, in the opinion of the Managing Trustees, for the benefit of the Regiment and to insure and maintain such property.
- c. For other charitable purposes, promoting efficiency or esprit de corps of all ranks of or serving with the Regiment, including the provision of recreational facilities and amenities not provided for out of public funds.
- d. To provide for the relief of hardship, distress or poverty amongst serving or former members of the Brigade of Gurkhas and dependents by the provision or application of monies whether by gift or loan.

These objects have been borne in mind by the Trustees during the period under review.

The Charity receives a generous grant each year from the Brigade Education and Welfare Fund. This is found from the Soldiers Day's Pay Giving scheme and must be spent within the financial year on activities that directly benefit serving members of the Regiment and their families. A list of activities supported during 2024/20254 forms part of the Annual Accounts and this has been submitted to HQBG and a copy attached to the accounts of the Charity.

Public benefit

The Fund achieves its objectives by the making of charitable grants out of its capital and income for the purpose of promoting the efficiency of the armed forces of The Crown, particularly by supporting the welfare of serving personnel and in commemorating the history and traditions of the Regiment.

The Charity usually makes a range of grants that award initiative, support adventurous training and sport, and other activities that are not adequately, or directly, provided from Public Funds. A wide range of activities were supported.

The Trustees consider, therefore, that the Charity more than met the requirement to provide Public Benefit under the charitable "Head" of "the promotion of the efficiency of the armed forces of The Crown". (*Explanation; There are number of "Heads of Charity". One of these is the promotion of the efficiency of the armed forces of The Crown and the emergency services*).

The Charity is not particularly well endowed financially and seeks to build reserves invested via the Armed Forces Charities Growth & Income Fund. During the year a further £4,000 was invested.

Trustees and advisers.

The Colonel of the Regiment and Chairman of the Board of Trustees - Brigadier Patch Reehal MBE

Other Ex-Officio Trustees are:

Commander QOGLR Lieutenant Colonel Oliver Nyman,
Gurkha Major QOGLR Major Bhim Shreesh.
WO1 (RSM) Tirtharaj Limbu

A new Trust Secretary Major Stu Milligan (took over on 13th July 2024 outside the period of this report).

Co-opted Trustees:

Major General Ian Copeland CB, who retired as a Trustee on 15th January 2025
Lieutenant Colonel (Retired) Paul Gilham who was to retire as a Trustee on 31st May 2024.

Finance Sub Committee. The Officer Commanding 36 (HQ) Squadron QOGLR Major Fergus Cowen RLC is Secretary of the Finance Committee which consists of the Co-Opted Trustees and Major (Retd) Mike Adler. Major Adler is NOT a voting member of this Committee. WO2 Santosh Rai RQMS of 10 QOGLR represents the GURTAM point of view.

Major Tom Cowan Officer Commanding 31 Squadron is the Property member.

The Independent Services Agency Ltd provides Treasurer support to the Trustees.

The Trustees continue to make use of Holt's Military Banking (part of the Royal Bank of Scotland plc) as their Bankers.

The Trust's investments are now entirely with the BlackRock Armed Forces Charities Growth & Income Fund (BRAFCG&IF income units).

Income and Expenditure

Income was derived wholly from the BRAFCG&IF income units. A small amount of bank deposit interest accrued. The Brigade Education and Welfare Fund made a grant of £20,241.00 which was used for welfare purposes within the expanded Regiment. The Trustees are continuing to grow the assets of the Charity in order to provide funds for future benevolence and the well-being of the Regiment.

Risk assessment and policy.

The Trustees review the risks, which might affect the Charity, on a regular basis. The main risk is assessed as being a major collapse of the Stock Market but, nevertheless, they consider that their investments, which are professionally managed, are as well diversified as they can be. The Trustees have experienced previous down turns in the market but, being a charity with long term expectations and requirements, they are content that their present investment policy is the proper one. Written policy documents are in place to cover risk management, investment and conflicts of interest. No such documents are required to cover volunteer management, safeguarding vulnerable beneficiaries and complaints handling as the Charity is most unlikely to have any involvement in such matters.

Activities and achievements.

All the activities planned for during the year were achieved and were successful.

Governance.

Trustees are selected on the basis of special skills that they can offer which will benefit the Charity in terms of its operation. A balance is maintained in order to ensure that both the retired and the serving elements of the Regiment are adequately represented. Trustees' training is mainly achieved by virtue of positions held by Trustees in their civilian or military capacities. Where necessary, the Independent Services Agency Ltd provides specialised technical advice on relevant current charity matters.

The Trustees are all "volunteers" and offer their services on a financially un-rewarded basis. No other volunteers are employed.

The Charity has no trading subsidiary and is not a member of the Fundraising Standards Board as it does not seek to raise funds.

Plans for the future.

Trustees plan to allocate funds to meet the needs of the expanded Regiment. Thus they intend to continue to grow the assets of the Charity and to assist the Regiment with grants for suitable charitable purposes.

Original Signed by the Secretary on behalf of all Trustees.

A handwritten signature in black ink, consisting of a stylized, cursive script that is difficult to decipher but appears to be a personal name.

Independent Examiner's Report to the Trustees of The Queen's Own Gurkha Logistic Regiment Regimental Trust

I report on the accounts of the Trust for the period ended 31 March 2025 as set out on the attached documents.

Respective responsibilities of the Trustees and the Examiner

As the Charity's Trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does NOT apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the act, whether particular matters have come to my attention. It will be noted that a small adjusting item has been included on the Receipts and Payments account but the materiality of this transaction is not considered to be significant nor a matter of concern.

Basis of the Independent Examiner's Report

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the Charity and a comparison of the accounts presented with those on record. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as Trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do NOT express an audit opinion on the view given in the accounts.

Independent Examiners Statement

In connection with my examination, NO matter has come to my attention;

(1) which gives me reasonable cause to believe that in any respect the requirements

~ to keep accounting records in accordance with section 41 of the Act; and

~ to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act

have not been met; or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Name; S. A. CRANWELL-CHILD.

Place; West End

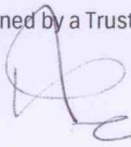
Date; 29 APRIL 2025

| | | | | |
|--|--|---|-----------------|--------------------|
| Payments | | For list of grants made in the year 2024/2025 | | |
| Payments directly for charitable purposes | from the Brigade Education & Welfare grant see list attached | | | |
| | -£23,889.34 | | | -£23,783.15 |
| | Other | COR Kukri | -£671.00 | -£350.00 |
| | Welfare grant house rebuild | | -£500.00 | -£733.90 |
| Colonel Commandant Leaving Present | | -£50.00 | | |
| | | -£25,110.34 | | -£24,867.05 |
| Other expenditure | | | | |
| Payments for publicity fund raising and management and administration | Fees | | | |
| | Just Giving | | £0.00 | -£144.00 |
| | Treasurer 2 2024/2025 | | NOT yet applied | -£650.00 |
| | Insurance | -£450.00 | -£410.00 | -£400.00 |
| | | -£1,260.00 | | |
| Other Minor grants | | | | |
| Chattels | Flags | -£371.40 | -£371.40 | -£742.80 |
| Medal engraving | | | -£42.00 | |
| Cricket OSV Nepal | | | -£1,650.00 | |
| NORTHERN STRIKE | | | -£150.00 | |
| Museum visit | | | -£44.00 | |
| GBA Subscription | | NOT YET PAID | | -£405.00 |
| Project Oyam | | | -£2,780.93 | |
| Accoutrements | | | -£6,688.53 | |
| Trustee out of pocket expenses | | | £0.00 | -£250.00 |
| Grants total | | -£38,468.60 | | -£26,908.03 |
| Re-investment (NOT counted as Expenditure) | | -£4,000.00 | | -£5,000.00 |
| Final Total | | -£42,468.60 | | -£31,908.03 |
| | | Income | £35,094.12 | £30,982.72 |
| | | Expenditure | -£42,468.60 | -£31,908.03 |
| Excess of expenditure over income | | -£7,374.48 | | -£925.31 |
| Cash funds last year end | | | | |
| RBS C/a | | £500.00 | | £500.00 |
| RBS D/a | | £15,149.55 | | £15,174.86 |
| | | -£1,500.00 | | -£600.00 |
| | | £14,149.55 | | £15,074.86 |
| | | | | -£925.31 |
| | | -£7,374.48 | | |
| Balance after deduction of excess expenditure over income | | £6,775.07 | | £14,149.55 |
| Add back previous year's uncleared | | £1,500.00 | | |
| | | £8,275.07 | | £14,149.55 |
| Cash funds this year end | | | | |
| RBS C/a | | £500.00 | | £500.00 |
| RBS D/a | | £15,057.60 | | £15,149.55 |
| less uncleared items | | -£7,282.53 | | -£1,500.00 |
| | | £8,275.07 | | £14,149.55 |

qogtraccounts2024/2025

Original Signed by a Trustee on behalf of all the Trustees.

Dated

 10 Jul 25

The Queen's Own Gurkha Logistic Regiment Regimental Trust

Balance sheet as at 31st March 2025

| Previous year | Capital Account | | | | Previous year | Investments | | Historic |
|--------------------|----------------------------------|------------|-------------|--------------------|--------------------|---|--------------------|--------------------|
| | | | | | Cost | Market Value at 31/3/24 | | Cost |
| £128,318.01 | Cost of BRAFCG&I Fund | | £133,318.01 | | £133,318.01 | BRAFCG&I £142,714.76 | £147,840.28 | £137,318.01 |
| £5,000.00 | Reinvestment in BRAFCG&I | | | £4,000.00 | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| £133,318.01 | | | | £137,318.01 | £133,318.01 | | | £137,318.01 |
| | Accumulation Account | | | | | | | |
| | Balances at 28 March 2024 | | | | | | | |
| £500.00 | Current a/c | £500.00 | | | £500.00 | £500.00 | | |
| £15,174.86 | Deposit a/c | £15,149.55 | | | £15,149.55 | £15,057.60 | | |
| -£600.00 | Uncleared items | | | | -£1,500.00 | -£7,282.53 | | |
| £15,074.86 | | | | £15,649.55 | | | £8,275.07 | |
| £30,982.72 | Add total income | | | £35,094.12 | | | | |
| | | | | £50,743.67 | | | | |
| -£31,908.03 | Less total expenditure | | | -£42,468.60 | | | | |
| £14,149.55 | | | | | £14,149.55 | Investments at Market Value £147,840.28 | | |
| | | | | | | Cash at Bank at year end £8,275.07 | | |
| | | | | | | Total Net worth at 31/03/2025 £156,115.35 | | £8,275.07 |

Expenditure summary

Grants from BEWF SDPS Fund

| | | | | |
|------------|---|------------|-------------------|-----------|
| 28/06/2024 | CB 1 RGR QOGLR B'day Brunei | 373 | £300.00 | £300.00 |
| 06/07/2024 | CB BGK 66th B'day grant | 374 | £200.00 | £200.00 |
| 04/07/2024 | CB 10 QOGLR (31 SQN Coins) | 375 | £262.00 | £262.00 |
| 08/07/2024 | CB 10 QOGLR Trailwalker | 376 | £258.00 | £258.00 |
| 08/07/2024 | CB 10 QOGLR 36 SQN AT | 377 | £200.00 | £200.00 |
| 15/07/2024 | CB 10 QOGLR 36 SQN Fam day & fishing | 378 | £1,250.00 | £1,250.00 |
| 24/07/2024 | CB 10 QOGLR Pipes & Drums | 354 | £580.00 | £580.00 |
| 24/07/2024 | CB 10 QOGLR Ladies Volleyball | 355 | £350.00 | £350.00 |
| 26/07/2024 | CB 10 QOGLR AT Germany | 356 | £500.00 | £500.00 |
| 09/09/2024 | CB 10 QOGLR DST Dashain | 357 | £100.00 | £100.00 |
| 10/09/2024 | CB 10 QOGLR Cambrian Ptl | 358 | £350.00 | £350.00 |
| 10/09/2024 | CB 10QOGLR Stalking | ONE cheque | £1,500.00 | £1,500.00 |
| 10/09/2024 | QOGLR Birthday | 358 | £921.84 | £921.84 |
| 17/09/2024 | CB 10 QOGLR Dashain | 360 | £2,600.00 | £2,600.00 |
| 17/09/2024 | CB 10 QOGLR DCLPA | 379 | £50.00 | £50.00 |
| 16/09/2024 | 9 Supply Regt RLC 94 SQN Dashain | 380 | £900.00 | £900.00 |
| 16/09/2024 | CB 13 AA SP REGT RLC 15 SQN Dashain | 381 | £700.00 | £700.00 |
| 03/10/2024 | GARRC SP BN Central Bank (Desrtica) | 383 | £200.00 | £200.00 |
| 30/09/2024 | 13 AASR PRI Central Bank (Trmple visit) | 384 | £150.00 | £150.00 |
| 04/10/2024 | ARRC SP BN & HQ 14 SQN Dashain | 385 | £700.00 | £700.00 |
| 08/10/2024 | CB 10 QOGLR Ladies day Tpt | 386 | £250.00 | £250.00 |
| 08/10/2024 | CB 10 QOGLR Falklands Dashain | 387 | £80.00 | £80.00 |
| | | | | |
| 23/10/2024 | GARRC Ex IMJIN SWING (Golf) | 390 | £400.00 | £400.00 |
| | Mr Subash Gurung (Ladies trip) | 391 | £250.00 | £250.00 |
| 05/11/2024 | CB 10 QIGLR 31 SQN AT | 392 | £280.00 | £280.00 |
| 25/11/2024 | CB 10 QOGLR LOGISTIC BOARDER | 396 | £900.00 | £900.00 |
| 09/01/2025 | CB 10 QOGLR Muster | 399 | £1,925.00 | £1,925.00 |
| 15/01/2025 | CB 10 QOGLR culture day | 400 | £1,262.50 | £1,262.50 |
| 07/02/2025 | ARRC SP BN 5 a side football | 402 | £300.00 | £300.00 |
| 10/03/2025 | Mr Raj Gurung 15SQN Cohesion | 403 | £200.00 | £200.00 |
| 05/03/2025 | CB 10 QOGLR 28 SQN Dinner Night | 404 | £420.00 | £420.00 |
| 25/03/2025 | CB 10 QOGLR Kasam Khane | 405 | £2,750.00 | £2,750.00 |
| 25/03/2025 | CB 10 QOGLR Nepali New Year | 406 | £500.00 | £500.00 |
| 26/03/2025 | CB10 QOGLR Temple Gumba etc | 407 | £2,000.00 | £2,000.00 |
| | CB 10 QOGLR Intake football | 409 | £300.00 | £300.00 |
| | | | £23,889.34 | |

| | |
|---------------------------|------------------|
| Total allocation to QOGLR | £26,225.46 |
| Expenditure as per above | -£23,889.34 |
| Still to spend | £2,336.12 |

THE QUEEN'S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST

England & Wales - Charity number 1011420

Accounts

REPORT BY THE TRUSTEES OF THE QUEEN' S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST FOR THE YEAR ENDED 31ST MARCH 2024

Background.

The original Queen's Own Gurkha Transport Regiment Regimental Trust came into being on 2nd April 1992, when the Trust Deed was formally adopted. Subsequently the structure of the Regiment changed dramatically as a result of reductions within the Brigade of Gurkhas and the withdrawal from Hong Kong.

Until 31st November 2012 the Regiment was embodied within 1, 28, 36, 66 (Fuel) & 94 Squadrons QOGLR, together with the 10QOGLR Light Aid Detachment all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and 9 Regiment The Royal Logistic Corps and other worldwide outlying detachments. Subsequently (from 1st December 2012) the Regiment re-roled as a Theatre Logistic Regiment. It was then embodied within 1 Supply Squadron, 28 Fuel and General Transport Squadron, 36 Headquarters Squadron and 10 QOGLR LAD, all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and other worldwide outlying detachments. The recent expansion of the Brigade of Gurkhas has resulted in the Regiment gaining additional Squadrons and roles. The new Squadrons are 14 Sqn, 15 Sqn, and 94 Sqn with 31 Squadron being reformed from 2023.

Objects of the Trust

The objects of the Trust are:

- a. To promote the efficiency of the Regiment and the maintenance of its history, traditions and esprit de corps.
- b. To purchase such chattels and other property as is, in the opinion of the Managing Trustees, for the benefit of the Regiment and to insure and maintain such property.
- c. For other charitable purposes, promoting efficiency or esprit de corps of all ranks of or serving with the Regiment, including the provision of recreational facilities and amenities not provided for out of public funds.
- d. To provide for the relief of hardship, distress or poverty amongst serving or former members of the Brigade of Gurkhas and dependents by the provision or application of monies whether by gift or loan.

These objects have been borne in mind by the Trustees during the period under review.

The Charity receives a generous grant each year from the Brigade Education and Welfare Fund. This is found from the Soldiers Day's Pay Giving scheme and must be spent within the financial year on activities that directly benefit serving members of the Regiment and their families. In the previous year, owing to the deployment of much of the Regiment overseas, it was NOT possible to spend the grant in full and HQBG was informed of this. £1,920 was carried forward to the year now under report. A list of activities supported during 2023/2024 will then be submitted to HQBG and a copy attached to the accounts of the Charity.

Public benefit

The Fund achieves its objectives by the making of charitable grants out of its capital and income for the purpose of promoting the efficiency of the armed forces of The Crown, particularly by supporting the welfare of serving personnel and in commemorating the history and traditions of the Regiment.

The Charity usually makes a range of grants that award initiative, support adventurous training and sport, and other activities that are not adequately, or directly, provided from Public Funds. A wide range of activities were supported.

The Trustees consider, therefore, that the Charity more than met the requirement to provide Public Benefit under the charitable "Head" of "the promotion of the efficiency of the armed forces of The Crown". (*Explanation; There are number of "Heads of Charity". One of these is the promotion of the efficiency of the armed forces of The Crown and the emergency services*).

The Charity is not well endowed financially and seeks to build reserves invested via the Armed Forces Charities Growth & Income Fund. During the year a further £5,000 was invested. The addition of the new Squadrons has resulted in expenditure to ensure that they really feel part of the Regiment and adopt its ethos and traditions.

Trustees and advisers.

The Colonel of the Regiment and Chairman of the Board of Trustees is Brigadier Patch Reehal MBE who was appointed on 1st August 2020.

Other Ex-Officio Trustees are:

- Commander QOGLR Lieutenant Colonel Oliver Nyman,
- Gurkha Major QOGLR Major Bhim Shreesh.
- Regimental Senior Major Gary Power.
- WO1 (RSM) Lok Sunuwar

Co-opted Trustees:

- Major General Ian Copeland CB,
- Lieutenant Colonel (Retired) Paul Gilham

The OC 1 Squadron QOGLR, Major Mike Ruocco RLC is Secretary to the Trustees.

Finance Sub Committee. The Officer Commanding 36 (HQ) Squadron QOGLR Major Fergus Cowen RLC is Secretary of the Finance Committee which consists of the Co-Opted Trustees and Major (Retd) Mike Adler. Major Adler is NOT a voting member of this Committee. WO2 Santosh Rai RQMS of 10 QOGLR represents the GURTAM point of view.

Major Tom Cowan Officer Commanding 31 Squadron is the Property member.

The Independent Services Agency Ltd provides Treasurer support to the Trustees.

The Trustees continue to make use of Holt's Military Banking (part of the Royal Bank of Scotland plc) as their Bankers.

The Trust's investments are now entirely with the BlackRock Armed Forces Charities Growth & Income Fund (BRAFCG&IF income units).

Income and Expenditure

Income was derived wholly from the BRAFCG&IF income units. A small amount of bank deposit interest accrued. The Brigade Education and Welfare Fund made a grant of £20,241.00 which was used for welfare purposes within the expanded Regiment. The Trustees are

continuing to grow the assets of the Charity in order to provide funds for future benevolence and the well-being of the Regiment.

Risk assessment and policy.

The Trustees review the risks, which might affect the Charity, on a regular basis. The main risk is assessed as being a major collapse of the Stock Market but, nevertheless, they consider that their investments, which are professionally managed, are as well diversified as they can be. The Trustees have experienced previous down turns in the market but, being a charity with long term expectations and requirements, they are content that their present investment policy is the proper one. Written policy documents are in place to cover risk management, investment and conflicts of interest. No such documents are required to cover volunteer management, safeguarding vulnerable beneficiaries and complaints handling as the Charity is most unlikely to have any involvement in such matters.

Activities and achievements.

All the activities planned for during the year were achieved and were successful.

Governance.

Trustees are selected on the basis of special skills that they can offer which will benefit the Charity in terms of its operation. A balance is maintained in order to ensure that both the retired and the serving elements of the Regiment are adequately represented. Trustees' training is mainly achieved by virtue of positions held by Trustees in their civilian or military capacities. Where necessary, the Independent Services Agency Ltd provides specialised technical advice on relevant current charity matters.

The Trustees are all "volunteers" and offer their services on a financially un-rewarded basis. No other volunteers are employed.

The Charity has no trading subsidiary and is not a member of the Fundraising Standards Board as it does not seek to raise funds.

Plans for the future.

Trustees plan to allocate funds to meet the needs of the expanded Regiment. Thus they intend to continue to grow the assets of the Charity and to assist the Regiment with grants for suitable charitable purposes.

Signed by the Secretary on behalf of all Trustees.

The original document was approved at the Trustees Meeting held on 21 May 2024



Independent Examiner's Report to the Trustees of The Queen's Own Gurkha Logistic Regiment Regimental Trust

I report on the accounts of the Trust for the period ended 31 March 2024 as set out on the attached documents.

Respective responsibilities of the Trustees and the Examiner

As the Charity's Trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does NOT apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the act, whether particular matters have come to my attention. It will be noted that a small adjusting item has been included on the Receipts and Payments account but the materiality of this transaction is not considered to be significant nor a matter of concern.

Basis of the Independent Examiner's Report

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the Charity and a comparison of the accounts presented with those on record. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as Trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do NOT express an audit opinion on the view given in the accounts.

Independent Examiners Statement

In connection with my examination, NO matter has come to my attention;

(1) which gives me reasonable cause to believe that in any respect the requirements

~ to keep accounting records in accordance with section 41 of the Act; and

~ to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act

have not been met; or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Name; S.A. Cranwell-Child.



Place; West End

Date; 23 April 2024

| Charity Accounting Statement (Receipts & Payments Basis) | | Unrestricted funds | | CC57 (a) | |
|--|---|--------------------|--------------------|---------------------------|--|
| The Queen's Own Gurkha Logistic Regiment Regimental Trust | | | | | |
| Receipts | | | | Previous Year | |
| Year ending 31 March 2024 | | | | Year ending 31 March 2023 | |
| This year's amount | | | | | |
| Gifts, donations & voluntary receipts | Other donations NOT GA | | £0.00 | £5.00 | |
| | Donations Regimental fund raising | | £869.71 | £646.00 | |
| | Donations via Just Giving | | £2,189.29 | £2,331.88 | |
| | Other donations BEWF | | £21,129.14 | £19,668.22 | |
| | | | £24,188.14 | £22,651.10 | |
| | Other | | £831.41 | | |
| Receipts earned from assets | BRAFCG&I Fund | | £5,725.72 | £5,424.76 | |
| Other receipts | Deposit interest | | | | |
| | RBS D/a interest | | £237.45 | £61.19 | |
| | | | £30,982.72 | £28,137.05 | |
| Capital raised from sale of investments (NOT Counting as Income) | | | | | |
| | BRAFCG&IF realisation of units | | | | |
| | | | £30,982.72 | £28,137.05 | |
| Payments | | | | | |
| For list of grants made in the year 2023/2024 from the Brigade Education & Welfare grant see list attached | | | | | |
| Payments directly for charitable purposes | | | -£23,783.15 | -£16,709.92 | |
| | Other COR Kukri | | -£350.00 | | |
| | Welfare flight | | -£733.90 | | |
| | | | -£24,867.05 | | |
| Other expenditure | | | | | |
| Payments for publicity fund raising and management and administration | Fees | | | | |
| | Just Giving | | -£144.00 | -£216.00 | |
| | Treasurer 2022/2023 (Cleared in 2023/24) | | | -£600.00 | |
| | Treasurer 2023/2024 | | -£650.00 | | |
| | | | | -£816.00 | |
| | Other Minor grants | | | | |
| | Wreath | | | | |
| | Chattels | | -£591.98 | -£2,105.59 | |
| | | | | -£2,105.59 | |
| | GBA Subscription | | -£405.00 | | |
| | | | | | |
| | Trustee out of pocket expenses | | -£250.00 | | |
| | Grants total | | -£26,908.03 | -£19,631.51 | |
| | Re-investment (NOT counted as Expenditure) | | -£5,000.00 | | |
| | | | -£31,908.03 | | |
| | | | £30,982.72 | | |
| | | | -£31,908.03 | | |
| | Excess of expenditure over income | | -£925.31 | £7,980.54 | |
| Cash funds last year end | | | | | |
| | RBS C/a | | £500.00 | £500.00 | |

| | | | | | | | | |
|---|---|--|---------------------|--|--|-------------------|--|-------------------|
| | RBS D/a | | | | | £15,174.86 | | £6,984.32 |
| | | | | | | -£600.00 | | -£390.00 |
| | | | | | | £15,074.86 | | £73,173.06 |
| | | | | | | -£925.31 | | £15,074.86 |
| | Balance after deduction of excess expenditure over income | | | | | | | |
| | | | | | | £14,149.55 | | |
| | | | | | | | | |
| | | | | | | £14,149.55 | | |
| Cash funds this year end | | | | | | | | |
| | RBS C/a | | | | | £500.00 | | £500.00 |
| | RBS D/a | | | | | £15,149.55 | | £15,174.86 |
| | | | less uncleared item | | | -£1,500.00 | | -£600.00 |
| | | | | | | £14,149.55 | | £15,074.86 |
| <i>qogtraccounts2023/2024</i> | | | | | | | | |
| Original Signed by a Trustee on behalf of all the Trustees. | | | | | | | | |
| Dated | | | | | | | | |

**BRIGADE OF GURKHAS EDUCATION AND WELFARE FUND
ANNUAL REGIMENTAL ASSOCIATIONS DONATIONS
END OF YEAR EXPENDITURE REPORT**

End of Year Report for FY 2023 -2024

THE QUEEN'S OWN GURKHAL LOGISTIC REGIMENT REGIMENTAL TRUST

| | | |
|--------------------------------------|-------------------------|-------------------|
| Amount of Donations received; | Receipts from HQBG BEWF | £10,564.57 |
| | | £10,564.57 |
| | | £21,129.14 |

Expenditure

| Serial | Purpose | Amount | Justification (Reason) for Expenditure |
|---------------|--|------------------|--|
| Previous Year | CB 10 QOGLR Balance of BEWF 22/23 | £1,920.00 | This was sent to the Central Bank on 6 Jun 23. See below. |
| | OP TOSCA 37 | £270.00 | Roll of Honour Boards |
| | EX SNOW PANTHER | £1,150.00 | AT Skiing |
| | Gate Guardian Project | £300.00 | Vehicles needed maintenance |
| | Cpl Krishna Headstone Memorial | £200.00 | Welfare grant |
| | | £1,920.00 | |

| | | | |
|---|-----------------------------|-----------|--|
| 1 | Mrs Meena Shahi (Ladies AT) | £1,000.00 | Grant to ladies who do so much to support the Regt |
| 2 | CB 10 QOGLR 1 SQN Cohesion | £450.00 | Welfare grant to 1 SQN |
| 3 | Santosh Rai, Nepal Cup kit | £2,500.00 | Kit for Team players |
| 4 | Regt Birthday grant | £2,500.00 | All Ranks function |
| 5 | QOGLR Dashain Grant | £2,600.00 | Dashain |
| 6 | 15 AA Sp SQN | £600.00 | Dashain |
| 7 | ARRC SP BN & HQ | £1,500.00 | Dashain |
| 8 | 9 SUPPLY REGT RLC | £600.00 | Dashain |

| | | | | | | | |
|----|--|--|--|--------------------|---|--|--|
| 9 | ARRC SP BN & HQ OSV Nepal | | | £650.00 | Sport Tour Nepal | | |
| 10 | 28 SQN food & venue | | | £540.00 | All Ranks function | | |
| 11 | 10 QOGLR (Alpine Ski Team) | | | £300.00 | AT Skiing | | |
| 12 | 10 QOGLR (Diwali) | | | £500.00 | Diwali | | |
| 13 | 10 QOGLR GM All Rks farewell | | | £1,000.00 | All Ranks function | | |
| 14 | 10 QOGLR EX KUKRI DASH | | | £360.00 | Deployed Troops Visit to Auschwitz | | |
| 15 | CG 10 QOGLR Berlin Visit | | | £1,521.00 | Deployed Troops Visit to Berlin | | |
| 16 | CB 10 QOGLR re OP GRANBY | | | £200.00 | All Ranks function | | |
| 17 | CB 10 QOGLR 1st tranche kit for new intake | | | £1,500.00 | Supplying items for welcome package to new Intake | | |
| 18 | CB 10 QOGLR 2nd tranche kit for new intake | | | £1,500.00 | As above 2nd tranche | | |
| 19 | Pipes & Drums | | | £500.00 | Kit purchase | | |
| 20 | Volley ball purchase | | | £233.20 | Sports Equipment | | |
| 21 | Football Table | | | £368.95 | Entertainment | | |
| 22 | Football | | | £250.00 | Sports Equipment | | |
| | | | | £21,173.15 | | | |
| | | | | -£21,129.14 | | | |
| | | | | £44.01 | | | |

Declaration:

The items of expenditure listed above are in accordance with the objects of the QOGLR Regimental Trust

| | | |
|------------------|-------------|----------------------------------|
| Signature | Name | Appointment |
| | | Treasurer QOGLR Regimental Trust |

| | |
|-------------|------------------|
| Per I&E A/c | £23,783.15 |
| Per return | -£21,173.15 |
| | <u>£2,610.00</u> |

| The Queen's Own Gurkha Logistic Regiment Regimental Trust | | | | | | | | | |
|---|-------------------------------|-------------|---------------|-------------------------------|-------------------------|--------------------------|-------------|-------------------------------|-------------|
| Balance sheet as at 31st March 2024 | | | | | | | | | |
| Previous year | Capital Account | | Previous year | Investments | Market Value at 31/3/23 | Market Value at 28/03/24 | Historic | | |
| | | | Cost | | | | Cost | | |
| £128,318.01 | Cost of BRAFCG&I Fund | £128,318.01 | £128,318.01 | BRAFCG&IF | £142,714.76 | £150,659.50 | £133,318.01 | | |
| | Reinvestment in BRAFCG&IF | £5,000.00 | | | | | | | |
| £128,318.01 | | £133,318.01 | £128,318.01 | | | | £133,318.01 | | |
| | Accumulation Account | | | Cash at Bank (income account) | | | | | |
| | Balance @ 01/04/2023 | | | | | | | | |
| £500.00 | Current account | £500.00 | | Balances at 28 March 2024 | | | | | |
| £6,984.32 | Deposit account | £15,174.86 | £500.00 | | | | | Current a/c | £500.00 |
| | Uncleared items | -£600.00 | £15,174.86 | | | | | Deposit a/c | £15,149.55 |
| £7,094.32 | | £15,074.86 | £15,674.86 | | | | | Uncleared items | ISA fee |
| | Add total income | £30,982.72 | -£600.00 | | | | | | |
| £7,980.54 | Less total expenditure | -£31,908.03 | £15,074.86 | | | | | | |
| | Just Giving adjustment | £14,149.55 | £15,074.86 | | | | | | |
| £15,074.86 | | £14,149.55 | £15,074.86 | | | | | Investments at Market Value | £150,659.50 |
| | | | | | | | | Cash at Bank at year end | £14,149.55 |
| | | | | | | | | Total Net worth at 28/03/2024 | £164,809.05 |

THE QUEEN'S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST

England & Wales - Charity number 1011420

Accounts

**REPORT BY THE TRUSTEES OF THE QUEEN' S OWN GURKHA LOGISTIC
REGIMENT REGIMENTAL TRUST FOR THE YEAR ENDED 31ST MARCH 2023**

Background.

The original Queen's Own Gurkha Transport Regiment Regimental Trust came into being on 2nd April 1992, when the Trust Deed was formally adopted. Subsequently the structure of the Regiment changed dramatically as a result of reductions within the Brigade of Gurkhas and the withdrawal from Hong Kong.

Until 31st November 2012 the Regiment was embodied within 1, 28, 36, 66 (Fuel) & 94 Squadrons QOGLR, together with the 10QOGLR Light Aid Detachment all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and 9 Regiment The Royal Logistic Corps and other worldwide outlying detachments. Subsequently (from 1st December 2012) the Regiment re-rolled as a Theatre Logistic Regiment. It was then embodied within 1 Supply Squadron, 28 Fuel and General Transport Squadron, 36 Headquarters Squadron and 10 QOGLR LAD, all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and other worldwide outlying detachments. The recent expansion of the Brigade of Gurkhas has resulted in the Regiment gaining additional Squadrons and roles. The new Squadrons are 14 Sqn, 15 Sqn, and 94 Sqn with 31 Sqn expected to be formed from 2023.

Objects of the Trust

The objects of the Trust are:

- a. To promote the efficiency of the Regiment and the maintenance of its history, traditions and esprit de corps.
- b. To purchase such chattels and other property as is, in the opinion of the Managing Trustees, for the benefit of the Regiment and to insure and maintain such property.
- c. For other charitable purposes, promoting efficiency or esprit de corps of all ranks of or serving with the Regiment, including the provision of recreational facilities and amenities not provided for out of public funds.
- d. To provide for the relief of hardship, distress or poverty amongst serving or former members of the Brigade of Gurkhas and dependents by the provision or application of monies whether by gift or loan.

These objects have been borne in mind by the Trustees during the period under review.

The Charity receives a generous grant each year from the Brigade Education and Welfare Fund. This is found from the Soldiers Day's Pay Giving scheme and must be spent within the financial year on activities that directly benefit serving members of the Regiment and their families. Owing to the deployment of much of the Regiment overseas it was NOT possible to spend the grant in full and HQBG have been informed of this. A residue of £2,958.30 remains to be voted upon at the Trustees Meeting to be held on 12 April 2023. A list of activities supported will then be submitted to HQBG and a copy attached to the accounts.

Public benefit

The Fund achieves its objectives by the making of charitable grants out of its capital and income for the purpose of promoting the efficiency of the armed forces of The Crown, particularly by supporting the welfare of serving personnel and in commemorating the history and traditions of the Regiment.

The Charity usually makes a range of grants that award initiative, support adventurous training and sport, and other activities that are not adequately, or directly, provided from Public Funds. A wide range of activities were supported.

The Trustees consider, therefore, that the Charity more than met the requirement to provide Public Benefit under the charitable "Head" of "the promotion of the efficiency of the armed forces of The Crown". (*Explanation; There are number of "Heads of Charity". One of these is the promotion of the efficiency of the armed forces of The Crown and the emergency services*).

The Charity is still in its comparative financial infancy and this restricts to some extent its ability to meet every objective. The addition of the new Squadrons has resulted in expenditure to ensure that they really feel part of the Regiment and adopt its ethos and traditions. With the expansion of the Regiment the Trustees have agreed that they must strive to increase the reserves of the Fund to serve a larger community of potential beneficiaries.

Trustees and advisers.

The Colonel of the Regiment and Chairman of the Board of Trustees is Brigadier Patch Reehal MBE who was appointed on 1st August 2020.

Other Ex-Officio Trustees are:

Commander QOGLR Lieutenant Colonel Giles Sugdon
Gurkha Major QOGLR Major Basantadhoj Shahi
Major Mike Ruocco
WO1 (RSM) Lokbahadur Sunuwar

Co-opted Trustees:

Major General Ian Copeland CB,
Lieutenant Colonel (Retired) Paul Gilham

The OC 1 Squadron QOGLR is Secretary to the Trustees.

The Officer Commanding 36 (HQ) Squadron QOGLR Major Emerson Hanley is Secretary of the Finance Committee which consists of the Co-Opted Trustees and Major (Retd) Mike Adler. Maj Adler is NOT a voting member of this Committee.
Major Gav Randell is the Property member.

The Independent Services Agency Ltd provides Treasurer support to the Trustees.

The Trustees continue to make use of Holt's Military Banking (part of the Royal Bank of Scotland plc) as their Bankers.

The Trust's investments are now entirely with the BlackRock Armed Forces Charities Growth & Income Fund (BRAFCG&IF income units).

Income and Expenditure

Income was derived wholly from the BRAFCG&IF income units. A small amount of bank deposit interest accrued. The Brigade Education and Welfare Fund made a grant of £19,688.22 which was used for welfare purposes within the expanded Regiment. The Trustees are continuing to grow the assets of the Charity in order to provide funds for future benevolence and the well-being of the Regiment.

Risk assessment and policy.

The Trustees review the risks, which might affect the Charity, on a regular basis. The main risk is assessed as being a major collapse of the Stock Market but, nevertheless, they consider that their investments, which are professionally managed, are as well diversified as they can be. The Trustees have experienced previous down turns in the market but, being a charity with long term expectations and requirements, they are content that their present investment policy is the proper one. Written policy documents are in place to cover risk management, investment and conflicts of interest. No such documents are required to cover volunteer management, safeguarding vulnerable beneficiaries and complaints handling as the Charity is most unlikely to have any involvement in such matters.

Activities and achievements.

All the activities planned for during the year were achieved and were successful.

Governance.

Trustees are selected on the basis of special skills that they can offer which will benefit the Charity in terms of its operation. A balance is maintained in order to ensure that both the retired and the serving elements of the Regiment are adequately represented. Trustees' training is mainly achieved by virtue of positions held by Trustees in their civilian or military capacities. Where necessary, the Independent Services Agency Ltd provides specialised technical advice on relevant current charity matters.

The Trustees are all "volunteers" and offer their services on a financially un-rewarded basis. No other volunteers are employed.

The Charity has no trading subsidiary and is not a member of the Fundraising Standards Board as it does not seek to raise funds.

Plans for the future.

Trustees plan to allocate funds to meet the needs of the expanded Regiment. Thus they intend to continue to grow the assets of the Charity and to assist the Regiment with grants for suitable charitable purposes.

Signed by a Trustee on behalf of all the Trustees

Original document signed

The original document was approved at the Trustees Meeting held on

..... 27th October 2023

Dated

qoglrannualreportoftrustees2023

| | | | | | | |
|---|---------|---|---------------------------------------|-------------------|-----------|------------------|
| | | Excess of Income over expenditure | | £7,980.54 | | |
| Cash funds last year end | | | | | | |
| | RBS C/a | | | £500.00 | £500.00 | |
| | RBS D/a | | | £6,984.32 | £7,649.07 | |
| | | | | -£390.00 | -£262.77 | |
| | | | | £7,094.32 | | £7,886.30 |
| | | Balance after addition of Excess of Income over expenditure | | £15,074.86 | | |
| | | Balance after deduction of excess expenditure over income | | | | £6,831.55 |
| | | | Add back last year's uncleared | | | £262.77 |
| | | | | | | £7,094.32 |
| Cash funds this year end | | | | | | |
| | RBS C/a | | | £500.00 | £500.00 | |
| | RBS D/a | | | £15,174.86 | £6,984.32 | |
| | | less uncleared item | | -£600.00 | -£390.00 | |
| | | | | £15,074.86 | | £7,094.32 |
| qogtraccounts2022/2023 | | | | | | |
| Original Signed by a Trustee on behalf of all the Trustees. | | | | | | |
| Dated | | | | | | |

| BEWF RETURN 2022 2023 | | | |
|--|---|----------------|-------------------|
| Date | Activity | Voucher | |
| 09/06/2022 | CB 10 QOGLR QOGLR BALLERS | 320 | £850.00 |
| 09/06/2022 | CB 10 QOGLR EX TIGER JWALAMUHKI | 321 | £500.00 |
| 27/05/2022 | CB 9 SUP REGT RLC Ping Pong Warriors | 361 | £250.00 |
| 30/08/2022 | | 323 | |
| | 10 QOGLR Dashain & Tihar | | £2,500.00 |
| | QOGLR Birthday | | £2,500.00 |
| | P&D Cohesion | covered | £300.00 |
| | QOGLR WO1 & WO2 Ladies Night | by one | £400.00 |
| | QOGLR Chef TRF | cheque | £468.76 |
| | QOGLR Chef 20th Anniversary | No 000323 | £1,000.00 |
| | TRAILWALKER | | £1,500.00 |
| | 31 SQN Property | | £600.00 |
| | WW1 Photographs | | £200.00 |
| 11/11/2022 | CB 10 QOGLR Dashain Sqns & Ski Team | 325 | £1,900.00 |
| 28/10/2022 | 9 SP REGT RLC VOLLEYBALL | 326 | £350.00 |
| 20/01/2023 | 13 Air Assault Support Regiment/ Mandir | 328 | £3,391.16 |
| Amount shown on nnuual accounts for the year ended 31 March 2023 | | | £16,709.92 |
| Subsequent grants made | OP TOSCA 37 Roll of Honour Boards | covered | £270.00 |
| | EX SNOW PANTHER Skiing | by one | £1,150.00 |
| | Gate Guardian Project | chq no | £300.00 |
| | Cpl Krishna Headstone Memorial | 333 | £200.00 |
| | QOGLR Ladies Expedition | 331 | £1,000.00 |
| | | | £19,629.92 |
| | Total amount received | | £19,668.22 |
| | Underspend | | £38.30 |

THE QUEEN'S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST

England & Wales - Charity number 1011420

Accounts

REPORT BY THE TRUSTEES OF THE QUEEN' S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST FOR THE YEAR ENDED 31ST MARCH 2022

Background.

The original Queen's Own Gurkha Transport Regiment Regimental Trust came into being on 2nd April 1992, when the Trust Deed was formally adopted. Subsequently the structure of the Regiment changed dramatically as a result of reductions within the Brigade of Gurkhas and the withdrawal from Hong Kong.

Until 31st November 2012 the Regiment was embodied within 1, 28, 36, 66 (Fuel) & 94 Squadrons QOGLR, together with the 10QOGLR Light Aid Detachment all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and 9 Regiment The Royal Logistic Corps and other worldwide outlying detachments. Subsequently (from 1st December 2012) the Regiment re-rolled as a Theatre Logistic Regiment. It was then embodied within 1 Supply Squadron, 28 Fuel and General Transport Squadron, 36 Headquarters Squadron and 10 QOGLR LAD, all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and other worldwide outlying detachments. The recent expansion of the Brigade of Gurkhas has resulted in the Regiment gaining additional Squadrons and roles. The new Squadrons are 14 Sqn, 60 Sqn (now resubordinated as 15 Sqn), and 94 Sqn with 31 Sqn expected to be formed from 2023.

Objects of the Trust

The objects of the Trust are:

- a. To promote the efficiency of the Regiment and the maintenance of its history, traditions and esprit de corps.
- b. To purchase such chattels and other property as is, in the opinion of the Managing Trustees, for the benefit of the Regiment and to insure and maintain such property.
- c. For other charitable purposes, promoting efficiency or esprit de corps of all ranks of or serving with the Regiment, including the provision of recreational facilities and amenities not provided for out of public funds.
- d. To provide for the relief of hardship, distress or poverty amongst serving or former members of the Brigade of Gurkhas and dependents by the provision or application of monies whether by gift or loan.

These objects have been borne in mind by the Trustees during the period under review. The Covid 19 pandemic altered the modus operandi of the Trust in that face to face meetings became impossible to run (owing to social distancing rules). Anticipating this, an amendment was made to the governing instruments of the Charity to enable meetings to be held electronically. In practice the administration of the Charity was not unduly affected by these measures but regretfully some events could not be held.

The Charity receives a generous grant each year from the Brigade Education and Welfare Fund. This must be spent, within the financial year, on activities that directly benefit serving members of the Regiment and their families. The grant was expended in full and a list of activities supported has been submitted to HQBG and a copy attached to the accounts.

Public benefit

The Fund achieves its objectives by the making of charitable grants out of its capital and income for the purpose of promoting the efficiency of the armed forces of The Crown,

particularly by supporting the welfare of serving personnel and in commemorating the history and traditions of the Regiment.

The Charity usually makes a range of grants that award initiative, support adventurous training and sport, and other activities that are not adequately, or directly, provided from Public Funds. Unfortunately, many of the regular activities could not be held but nevertheless grants were made and a wide range of activities were supported.

The Trustees consider, therefore, that the Charity more than met the requirement to provide Public Benefit under the charitable "Head" of "the promotion of the efficiency of the armed forces of The Crown". (*Explanation; There are number of "Heads of Charity". One of these is the promotion of the efficiency of the armed forces of The Crown and the emergency services*).

The Charity is still in its comparative financial infancy and this restricts to some extent its ability to meet every objective. The addition of the four new Squadrons has resulted in expenditure to ensure that they really feel part of the Regiment and adopt its ethos and traditions. Some re-investment was also made. With the expansion of the Regiment the Trustees have agreed that they must strive to increase the reserves of the Fund to serve a larger community of potential beneficiaries.

Trustees and advisers.

The Colonel of the Regiment and Chairman of the Board of Trustees is Brigadier Patch Reehal who took over from Major General Angus Fay CB on 1st August 2020.

Other Ex-Officio Trustees as 1st August 2022 were:

Commander QOGLR Lieutenant Colonel Giles Sugdon
Gurkha Major QOGLR Major Basantadhoj Shahi
Chairman QOGLR Association Lieutenant Colonel (Retired) Chris Green
Secretary QOGLR Association Mr Palijar Tamang
The Officer Commanding 1 Squadron QOGLR Major James Sutton
The Officer Commanding 28 Squadron QOGLR Major Gavin Randell
The Officer Commanding 36 (HQ) Squadron QOGLR Major Emerson Hanley

Co-opted Trustees:

Major General Ian Copeland CB,
Lieutenant Colonel (Retired) Paul Gilham

The OC 1 Squadron QOGLR is Secretary to the Trustees.

The Independent Services Agency Ltd provides Treasurer support to the Trustees.

The Trustees continue to make use of Holt's Military Banking (part of the Royal Bank of Scotland plc) as their Bankers.

The Trust's investments are now entirely with the BlackRock Armed Forces Charities Growth & Income Fund (BRAFCG&IF income units).

Income and Expenditure

Income was derived wholly from the BRAFCG&IF income units. A very small amount of bank deposit interest accrued. The Brigade Education and Welfare Fund made a grant of

£18,257.53 which was used for welfare purposes within the expanded Regiment. The Trustees are continuing to grow the assets of the Charity in order to provide funds for future benevolence and the well-being of the Regiment.

Risk assessment and policy.

The Trustees review the risks, which might affect the Charity, on a regular basis. The main risk is assessed as being a major collapse of the Stock Market but, nevertheless, they consider that their investments, which are professionally managed, are as well diversified as they can be. The Trustees have experienced previous down turns in the market but, being a charity with long term expectations and requirements, they are content that their present investment policy is the proper one. Written policy documents are in place to cover risk management, investment and conflicts of interest. No such documents are required to cover volunteer management, safeguarding vulnerable beneficiaries and complaints handling as the Charity is most unlikely to have any involvement in such matters.

Activities and achievements.

All the limited range of activities permissible during the year were achieved and were successful.

Governance.

Trustees are selected on the basis of special skills that they can offer which will benefit the Charity in terms of its operation. A balance is maintained in order to ensure that both the retired and the serving elements of the Regiment are adequately represented. Trustees' training is mainly achieved by virtue of positions held by Trustees in their civilian or military capacities. Where necessary, the Independent Services Agency Ltd provides specialised technical advice on relevant current charity matters.

The Trustees are all "volunteers" and offer their services on a financially un-rewarded basis. No other volunteers are employed.

The Charity has no trading subsidiary and is not a member of the Fundraising Standards Board as it does not seek to raise funds.

Plans for the future.

Trustees plan to allocate funds to meet the needs of the expanded Regiment. Thus they intend to continue to grow the assets of the Charity and to assist the Regiment with grants for suitable charitable purposes.

Signed by a Trustee on behalf of all the Trustees

Original document signed

The original document was approved at the Trustees Meeting held on 7th September 2022.

.....

Dated

qoglrannualreportoftrustees2022 (EH incl)

Independent Examiner's Report to the Trustees of The Queen's Own Gurkha Logistic Regiment Regimental Trust

I report on the accounts of the Trust for the period ended 31 March 2022 as set out on the attached documents.

Respective responsibilities of the Trustees and the Examiner

As the Charity's Trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does NOT apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the act, whether particular matters have come to my attention. It will be noted that a small adjusting item has been included on the Receipts and Payments account but the materiality of this transaction is not considered to be significant nor a matter of concern.

Basis of the Independent Examiner's Report

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the Charity and a comparison of the accounts presented with those on record. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as Trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do NOT express an audit opinion on the view given in the accounts.

Independent Examiners Statement

In connection with my examination, NO matter has come to my attention;

(1) which gives me reasonable cause to believe that in any respect the requirements

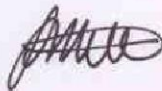
~ to keep accounting records in accordance with section 41 of the Act; and

~ to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act

have not been met; or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Name;



S.A. CRANWELL-CHILD.

Place; West End

Date;

5 May 2022

| Charity Accounting Statement (Receipts & Payments Basis) | | Unrestricted funds | CC57 (a) |
|---|------------------------------------|--------------------|---------------------------|
| The Queen's Own Gurkha Logistic Regiment Regimental Trust | | | |
| Receipts | Year ending 31 March 2022 | | Year ending 31 March 2021 |
| | <i>This year's amount</i> | | |
| Gifts, donations & voluntary receipts | Amazon Erope Core | £5.00 | £0.00 |
| | Donations Regimental fund raising | £846.00 | £5,690.94 |
| | Donations via Just Giving | £2,391.05 | £2,485.14 |
| | Other donations BEWF | £18,257.53 | £18,399.00 |
| | | £21,499.58 | £26,575.08 |
| Receipts earned from assets | BRAFCG&I Fund | £5,227.52 | £4,015.45 |
| | Charifund | Holding sold | £286.48 |
| | Newton Global Growth & Income Fund | Holding sold | £240.66 |
| | | £5,227.52 | £4,542.59 |
| Other receipts | Deposit interest | | |
| | RBS D/a interest | £1.25 | £5.06 |
| | Refund Sidrs Christmas Lunch | £0.00 | £256.54 |
| | Muktinath refund | £0.00 | £323.38 |
| | | £1.25 | £579.92 |
| | | £26,728.35 | £31,702.65 |
| Capital raised from sale of investments (NOT Counting as Income) | | | |
| | BRAFCG&IF realisation of units | £5,000.00 | |
| | M&G Charifund sale proceeds | N/a | £18,373.94 |
| | Newton sale proceeds | N/a | £43,705.65 |
| | Total receipts | £31,728.35 | £62,079.59 |
| | | | £31,702.65 |

| Payments | For list of grants made in the year 2021/2022 from the Brigade Educaton & Welfare grant see list attached | | |
|---|---|-----------------------|-------------------|
| Payments directly for charitable purposes | | | |
| | -£18,258.00 | | |
| | Previous year's BEWF grant paid in this year | | |
| | -£12,432.75 | | |
| | | -£30,690.75 | |
| Other expenditure | | | -£20,115.57 |
| | | | |
| Fees | | | |
| Just Giving | -£216.00 | | -£216.00 |
| Treasurer | -£500.00 | | |
| | | -£716.00 | |
| Other Minor grants | | | |
| Wreath | -£20.00 | | |
| Messing at Crowborough | -£35.15 | | |
| Kukri engraving | -£100.00 | | |
| Colonel of Regiment's Kukri | -£320.00 | | |
| Painting repairs | -£115.20 | | -£1,438.59 |
| | | -£590.35 | |
| GBA Subscription | | -£390.00 | |
| | | | -£1,828.59 |
| Marquee purchase & Kukris | | | -£5,410.00 |
| | | | -£7,238.59 |
| Previous year uncleared item | | | -£262.77 |
| Chattels | | -£238.00 | -£23.29 |
| Trustee out of pocket expenses | | -£158.00 | £0.00 |
| Grants total | | -£32,783.10 | -£7,524.65 |
| Payments for publicity | ISA fee for 2021/2022 | | |
| fund raising and management | NOT yet applied | | |
| and administration | Just Giving | | -£216.00 |
| | | | |
| | | Total Payments | -£7,740.65 |

The Queen's Own Gurkha Logistic Regiment Regimental Trust

Balance sheet as at 31st March 2022

| Previous year | Capital Account | Investment | Market Value at 31/3/21 | Market Value at 31/03/22 | Historic Cost |
|---------------|---|-----------------------------|-------------------------|-----------------------------|---------------|
| £46,132.09 | Cost of BRAFCG&I Fund | Charifund | N/a | sold entire holding 22/5/20 | |
| | | BRAFCG&IF | £150,907.28 | £159,751.83 | £128,318.01 |
| | Cost of Charifund units sold -£16,747.99 | Newton G&I Fd for Charities | N/a | sold entire holding 28/5/20 | |
| | | | | £159,751.83 | |
| -£4,246.00 | Less cost of AFCIF units sold | | | | |
| | | | | | |
| | Cost of Newton Units sold -£36,394.16 | | | | |
| £86,431.92 | Add sum re-invested in BRAFCG&I Fund | | | | |
| £128,318.01 | | | | | £128,318.01 |
| | Accumulation Account | | | | |
| | Balance @ 01/04/2021 | | | | |
| £500.00 | Current account | | | Balances at 31 March 2022 | |
| £8,009.20 | Deposit account | | | Current a/c | £500.00 |
| -£232.57 | Uncleared items | | | Deposit a/c | £6,984.32 |
| £8,276.63 | | | | Uncleared items | |
| | | | | GBA Sub | -£390.00 |
| -£390.33 | Excess of expenditure over income | | | | £7,094.32 |
| | Add back last year's uncleared | | | | |
| £7,886.30 | | | | | £7,094.32 |

THE QUEEN'S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST

England & Wales - Charity number 1011420

Accounts

REPORT BY THE TRUSTEES OF THE QUEEN' S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST FOR THE YEAR ENDED 31ST MARCH 2021

Background.

The original Queen's Own Gurkha Transport Regiment Regimental Trust came into being on 2nd April 1992, when the Trust Deed was formally adopted. Subsequently the structure of the Regiment changed dramatically as a result of reductions within the Brigade of Gurkhas and the withdrawal from Hong Kong.

Until 31st November 2012 the Regiment was embodied within 1, 28, 36, 66 (Fuel) & 94 Squadrons QOGLR, together with the 10QOGLR Light Aid Detachment all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and 9 Regiment The Royal Logistic Corps and other worldwide outlying detachments. Subsequently (from 1st December 2012) the Regiment re-rolled as a Theatre Logistic Regiment. It was then embodied within 1 Supply Squadron, 28 Fuel and General Transport Squadron, 36 Headquarters Squadron and 10 QOGLR LAD, all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and other worldwide outlying detachments. The recent expansion of the Brigade of Gurkhas has resulted in the Regiment gaining additional Squadrons and roles. The new Squadrons are 60 Sqn and 94 Sqn.

Objects of the Trust

The objects of the Trust are:

- a. To promote the efficiency of the Regiment and the maintenance of its history, traditions and esprit de corps.
- b. To purchase such chattels and other property as is, in the opinion of the Managing Trustees, for the benefit of the Regiment and to insure and maintain such property.
- c. For other charitable purposes, promoting efficiency or esprit de corps of all ranks of or serving with the Regiment, including the provision of recreational facilities and amenities not provided for out of public funds.
- d. To provide for the relief of hardship, distress or poverty amongst serving or former members of the Brigade of Gurkhas and dependents by the provision or application of monies whether by gift or loan.

These objects have been borne in mind by the Trustees during the period under review. The Covid 19 pandemic altered the modus operandi of the Trust in that face to face meetings became impossible to run (owing to social distancing rules). Accordingly, an amendment was made to the governing instruments of the Charity to enable meetings to be held electronically. In practice the administration of the Charity was not unduly affected by these measures but regretfully events such as the celebration of the Regimental Birthday and Dashain could not be held.

Public benefit

The Fund achieves its objectives by the making of charitable grants out of its capital and income for the purpose of promoting the efficiency of the armed forces of The Crown, particularly by supporting the welfare of serving personnel and in commemorating the history and traditions of the Regiment.

The Charity usually makes a range of grants that award initiative, support adventurous training and sport, and other activities that are not adequately, or directly, provided from Public Funds. Unfortunately many of the regular activities could not be held but nevertheless grants were made and a wide range of activities were supported.

The Trustees consider, therefore, that the Charity more than met the requirement to provide Public Benefit under the charitable "Head" of "the promotion of the efficiency of the armed

forces of The Crown". (*Explanation; There are number of "Heads of Charity". One of these is the promotion of the efficiency of the armed forces of The Crown and the emergency services*).

The Charity is still in its comparative financial infancy and this restricts to some extent its ability to meet every objective. The addition of the two new Squadrons has resulted in expenditure to ensure that they really feel part of the Regiment and adopt its ethos and traditions. Some re-investment was also made. With the expansion of the Regiment the Trustees have agreed that they must strive to increase the reserves of the Fund to serve a larger community of potential beneficiaries.

Trustees and advisers.

The Colonel of the Regiment and Chairman of the Board of Trustees is Brigadier Patch Reehal who took over from Major General Angus Fay CB on 1st August 2020.

Other Ex-Officio Trustees at 31st March 2021 were:

Commander QOGLR Lieutenant Colonel Giles Sugdon
Gurkha Major QOGLR Major Indra Tamang
Chairman QOGLR Association Lieutenant Colonel (Retired) C R C Green
Secretary QOGLR Association currently vacant
The Officer Commanding 1 Squadron QOGLR Major Nicholas Heppenstall, MBE
The Officer Commanding 28 Squadron QOGLR Major Antony Brazier
The Officer Commanding 36 (HQ) Squadron QOGLR Major Gary Power

Co-opted Trustees:

Major General IM Copeland CB,
Lieutenant Colonel(Retired) PAC Gilham

The OC 1 Squadron QOGLR is Secretary to the Trustees.

The Independent Services Agency Ltd provides Treasurer support to the Trustees.

The Trustees continue to make use of Holt's Military Banking (part of the Royal Bank of Scotland plc) as their Bankers.

The Trust's investments managed by M&G (Charifund income units) and by Newton (Growth and Income Fund For Charities) were sold during the year and the proceeds re-invested into the BlackRock Armed Forces Charities Growth & Income Fund (BRAFCG&IF income units).

Income and Expenditure

Income has arisen from the investment in M&G Charifund Income Units and from the Newton Growth & Income Fund before the sale of these holdings. Thereafter investment income was derived wholly from the BRAFCG&IF income units. A very small amount of bank deposit interest accrued. The Brigade Education and Welfare Fund made a grant of £18,399 which was used for welfare purposes within the expanded Regiment. The Trustees are continuing to grow the assets of the Charity in order to provide funds for future benevolence and the well-being of the Regiment.

Risk assessment and policy.

The Trustees review the risks, which might affect the Charity, on a regular basis. The main risk is assessed as being a major collapse of the Stock Market but, nevertheless, they consider that their investments, which are professionally managed, are as well diversified as they can be. The Trustees have experienced previous down turns in the market but, being a charity with long term expectations and requirements, they are content that their present investment policy is the proper one. Written policy documents are in place to cover risk management, investment and conflicts of interest. No such documents are required to cover volunteer management, safeguarding vulnerable beneficiaries and complaints handling as the Charity is most unlikely to have any involvement in such matters.

Activities and achievements.

All the limited range of activities permissible during the year were achieved and were successful.

Governance.

Trustees are selected on the basis of special skills that they can offer which will benefit the Charity in terms of its operation. A balance is maintained in order to ensure that both the retired and the serving elements of the Regiment are adequately represented. Trustees' training is mainly achieved by virtue of positions held by Trustees in their civilian or military capacities. Where necessary, the Independent Services Agency Ltd provides specialised technical advice on relevant current charity matters.

The Trustees are all "volunteers" and offer their services on a financially un-rewarded basis. No other volunteers are employed.

The Charity has no trading subsidiary and is not a member of the Fundraising Standards Board as it does not seek to raise funds.

Plans for the future.

Trustees plan to allocate funds to meet the needs of the expanded Regiment. Thus they intend to continue to grow the assets of the Charity and to assist the Regiment with grants for suitable charitable purposes.

Signed by a Trustee on behalf of all the Trustees

Original document signed

.....

Dated

Independent Examiner's Report to the Trustees of The Queen's Own Gurkha Logistic Regimental Trust

I report on the accounts of the Trust for the period ended 31 March 2021 as set out on the attached documents.

Respective responsibilities of the Trustees and the Examiner

As the Charity's Trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does NOT apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the act, whether particular matters have come to my attention. It will be noted that a small adjusting item has been included on the Receipts and Payments account but the materiality of this transaction is not considered to be significant nor a matter of concern.

Basis of the Independent Examiner's Report

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the Charity and a comparison of the accounts presented with those on record. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as Trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do NOT express an audit opinion on the view given in the accounts.

Independent Examiners Statement

In connection with my examination, NO matter has come to my attention;

(1) which gives me reasonable cause to believe that in any respect the requirements

~ to keep accounting records in accordance with section 41 of the Act; and

~ to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act

have not been met; or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Name;

Original Signed

Place; West End

Date; 9/6/21

