

THE BURFORD RELIEF IN NEED CHARITY

England & Wales · Charity number 1036378

Details

Other names	BURFORD CHARITIES
Status	Registered
Legal form	Other
Registered	1994-04-12
Register	View on the Charity Commission register

Contact

Address	Whitehill Farm Burford OX18 4DT
Phone	01993822894

Activities

Objects: IN RELIEVING EITHER GENERALLY OR INDIVIDUALLY PERSONS RESIDENT IN THE AREA OF BENEFIT WHO ARE IN CONDITIONS OF NEED, HARDSHIP OR DISTRESS BY MAKING GRANTS OF MONEY OR PAYING FOR ITEMS, SERVICES OR FACILITIES CALCULATED TO REDUCE THE NEED, HARDSHIP OR DISTRESS OF SUCH PERSONS, AND THE RELIEF OF SICKNESS AND THE PRESERVATION OF HEALTH AMONG PEOPLE RESIDING PERMANENTLY OR TEMPORARILY IN THE CHARITY'S AREA OF BENEFIT

Activities: The Burford Relief In Need Charity provides financial assistance in case of need, educational assistance to help recipients earn a living, and the relief of sickness and the preservation of health among people residing within a seven mile radius of the Tolsey in Burford.

Classification

- **How:** Makes Grants To Individuals
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives, The Prevention Or Relief Of Poverty
- **Who:** Children/young People, Elderly/old People, People With Disabilities

Geography

- **Area of benefit:** 7 MILES RADIUS FROM THE TOLSEY, BURFORD
- Oxfordshire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-12-31	£31,264	£7,551	-	-
2024-12-31	£32,137	£10,658	-	-
2023-12-31	£137,632	£15,174	-	-
2022-12-31	£27,341	£7,295	-	-
2021-12-31	£189,847	£8,954	-	-

Trustees

Name	Role	Appointed
Don Griffin	Chair	2015-08-03
DESMOND LAWTON		2022-03-16
David Nathan Cohen		2018-11-07
Dr John Peter Doris		2026-06-04
JANE CHRISTINE ANN TUNNELL-WESTMACOTT		2012-04-21
Karen Gadd		2023-08-06
MRS PENNY BARRACLOUGH		
Nigel John Street		2019-08-05
Rev Thomas David Putt		2019-08-05
Susan Doris		2023-08-07

THE BURFORD RELIEF IN NEED CHARITY

England & Wales - Charity number 1036378

Accounts

BURFORD CHARITIES

THE BURFORD RELIEF IN NEED CHARITY

Report and Financial Statements

Year Ended 31 December 2025

Charity no: 1036378

BURFORD RELIEF IN NEED CHARITY
REPORT OF THE TRUSTEES

31 DECEMBER 2025

Charity Registered Numbers: 1036378

EX OFFICIO

The Reverend Tom Putt

NOMINATIVE TRUSTEES (Town Council)

Mrs J Tunnell-Westmacott
Mr D Cohen

CO-OPTED TRUSTEES

Mr N Street
Mrs P Barraclough
Mr D P Griffin FCA (Chairman))
Mr J . Harrington (Deceased December 2025)
Mrs S Doris
Mr C G Williams
Mr D Lawton (Treasurer)
Mrs K Gadd

HONORARY SECRETARY

Mrs A Youngson
Whitehill Farm
Burford
Oxon, OX18 4DT

BANKERS

TSB Bank plc, 13, High Street, Witney, Oxon, OX28 6PH

INDEPENDENT EXAMINER

B L Connolly ACA
Arubus Chartered Accountants
The Old Smithy, Stockton's Courtyard
Overbury
Glos
GL20 7NT

The trustees present their Annual Report and Receipts and Payments Accounts for the year ended 31 December 2025

Charitable Status

The Burford Relief in Need Charity is administered under a trust deed (Charity Commission reference 238,130 A/2) dated 20 February 1992.

Objectives and Activities

The main activity of the charity is in Burford with an area of benefit within a seven mile radius of the Tolsey in Burford. The Burford Relief in Need Charity provides financial assistance in case of need, and educational assistance to help recipients earn a living and to promote the relief of sickness and the preservation of health among people living in the area of benefit.

Principal Address

The principal address is:

Whitehill Farm
Burford
Oxon
OX18 4DT

Tel: 01993-822894

Trustees

In accordance with the scheme approved by the Charity Commissioners, nominated trustees appointed by the Burford Town Council, serve for a term of four years. Co-opted trustees are appointed for a term of five years by a resolution of the trustees passed at a special meeting of the Trustees. When vacancies arise, local persons are invited by the trustees to become co-opted trustees. New trustees are briefed before their appointment is confirmed.

Meetings

The trustees held four ordinary meetings during the year.

It is with great sadness that we record the death of John Harrington a valued and committed trustee. John was a keen sportsman and enjoyed travel with his wife Jacky. His core competence was marketing, advertising and sponsorships. He used these to create /establish "Time Out", a local community group supporting elderly people living alone. John soon recruited volunteers to facilitate and support attendance and this facility quickly became a major draw for 30 people in the vicinity. It was a major event every Monday for many and John was front and centre of this initiative. He will be sorely missed in Burford and the surrounding areas. Jacky has agreed to continue the "Time Out " initiative and we wish her all the best in her efforts which we are proud to support.

Investment powers

The trustees have no special investment powers. Accordingly, investments are confined to narrower-range securities and common investment schemes. Cash surplus to immediate requirements is invested in the COIF Charities Deposit Fund. The Charity developed specific guidelines for investment of the proceeds of sale of the Shilton Road as set out below:

Guidelines for Investment of proceeds from sale of Shilton Land

- 1) Considered to be a long term investment with time horizon of 7-10 years.
- 2) Capital preservation as a minimum requirement but preferably with growth around inflation rate
- 3) Main driver is income in the range of 3-5% per annum on capital base of 1.1 mio.
- 4) Diversified portfolio both in terms of sector (mainly defensive stable equities), and geography (some exposure to Far East for its growth potential) with less exposure to US. Liquidity remains relevant so no alternative investments.
- 5) Simplicity of distributions for accounting purposes (pooled funds).
- 6) Fund management type- some index tracking and passive management. Too much emphasis on active management can lead to higher costs and complexity of transactions. Avoid non-sustainable non-ethical investments.
- 7) Charges should be no more than 1%.

Following the closure by the Health Authority of the Burford Cottage Hospital, the assets of the Burford Health Care Fund were transferred to the Burford Relief in Need Charity. Consequently, the Charity Commissioners on 15 July 2005 approved the alteration of the Scheme dated 20th February 1992 to include the relief of sickness and the preservation of health among people residing in the area of benefit. This has enabled the trustees to make grants to promote good health and assist those physically handicapped as well as assisting in education needs and helping those in financial need.

The charity does not employ any staff. The charity is administered by the trustees who do not charge for their services.

The trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The Burford Relief in Need Charity continued to give assistance to relieve hardship and distress, for educational purposes and for health care. Grants for the year totalled £6,836 of which £2,566 was a payment towards the running costs of the Time Out centre at Warwick Hall.

Financial Review

As at 31 December 2025, the market value of investments of the Unrestricted Fund amounted to £240,665 whilst the market value of the Endowment Fund investments was £145,261. The trustees agreed that based on the increase in funds held in current account that 3 fixed one year term deposits should be made with Building Societies and these were renewed at maturity with an additional £20,000 added. Currently the three bonds expiring in 2026 total approx £236,560

The Charity's policy on reserves is to retain funds so as to support the operation of the new Day Centre for the elderly and meet any contingencies that might arise for assisting people in need, for the preservation of health and to assist the education costs of students.

Plans for Future Periods

Having provided grants of £200,000 over 2015 and 2016 towards the building, fitting out and furnishings of a new day centre to replace the facility lost when the Burford Cottage Hospital was closed, the trustees continue to assist in funding some of the costs commensurate with the Relief In Need Charity objectives and activities. The day centre is now operating, so the Relief in Need Charity is assisting in supporting some of the running costs out of its income.

Statement of trustees' responsibilities

Charity Law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charities and of the surplus or deficit of the charities for that period. In preparing those statements, the trustees are required to:

- . select suitable accounting policies and then apply them consistently;
- . make judgements and estimates that are reasonable and prudent;
- . state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and;
- . prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charities will continue in operational existence.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charities and to enable them to ensure that the financial statements comply with the Charities Act 2011 and the Charity (Accounts and Reports) Regulations 2008.

They are also responsible for safeguarding the assets of the charities and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Professional advisers and relevant organisations

Details of professional advisers and other relevant organisations are provided at the front of these accounts.

The Trustees financial adviser is Progressive Strategic Solutions LLP, The Granary, Steadings Business Centre, Church Road, Maisemore, Gloucestershire, GL2 8EY who is authorised by the Financial Conduct Authority.

Independent Examiner

Mrs B L Connolly was first appointed as the charity's independent examiner in 2014. The trustees intend to invite Mrs B L Connolly to undertake the independent examination of the trusts for the financial year to 31 December 2026.

Approved by the Trustees on 12th March 2026 and signed on their behalf by:

D Griffin

Chairman of the Trustees





Charity Name
The Burford Relief in Need Charity

No (if any)
1036378

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Receipts and payments accounts

For the period from
Period start date
01-Jan-25
To
Period end date
31-Dec-25

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Rents from land	2,000	-	-	2,000	2,000
Investment income	12,732	-	-	12,732	22,703
Bank interest	14,972	-	-	14,972	6,099
Donations	-	-	-	-	-
Other income Overage Shilton Road	-	-	-	-	1,336
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	29,704	-	-	29,704	32,137
A2 Asset and investment sales, (see table).					
				-	350,000
Interest compounded Saffron	1,560	-	-	1,560	-
Sub total	1,560	-	-	1,560	350,000
Total receipts	31,264	-	-	31,264	382,137
A3 Payments					
Education grants		-	-	-	3,500
Grants for almspeople	570	-	-	570	570
Health care grants	-	-	-	-	-
Other grants	3,700	-	-	3,700	4,000
Grant towards new day centre	2,566	-	-	2,566	2,300
Legal fees	-	-	-	-	-
Property repairs	319	-	-	319	-
Insurance	-	-	-	-	-
General expenses	-	-	-	-	-
Accountancy fees	396	-	-	396	288
Paid to Almshouse for Property Purchase		-	-	-	350,000
Sub total	7,551	-	-	7,551	360,658
A4 Asset and investment purchases					
		-	-	-	-
		-	-	-	-
Sub total	-	-	-	-	-
Total payments	7,551	-	-	7,551	360,658
Net of receipts/(payments)	23,713	-	-	23,713	21,479
A5 Transfers between funds		-	-	-	-
A6 Cash funds last year end	375,161	-	-	375,161	353,682
Cash funds this year end	398,874	-	-	398,874	375,161

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	TSB	15,292	-	-
	Coif Deposit Fund	45,840	-	-
	Coif Deposit Fund	101,182	-	-
	Dudley BS 1 Year Bond	85,000	-	-
	Cambridge BS 1 Year Bond	85,000	-	-
	Saffron BS 1 Year Bond	66,560	-	-
	Total cash funds	398,874	-	-

(agree balances with receipts and payments account(s))

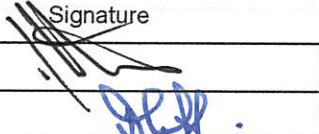
Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	Agricultural land	Endowment	13,363	-
	Common investment funds	Endowment	46,299	145,621
	Common investment funds	Unrestricted fund	175,770	240,665
	Embark investments (Shilton Road proceeds)	Endowment	612,954	676,785
	Brewin Dolphin Investments	Endowment	134,930	173,244

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	D Lawton	12/03/2026
	D P Griffin	

Independent examiner's report on the accounts

Report to the trustees/ members of The Burford Relief in Need Charity

On accounts for the year ended 31 December 2024

Charity no 1036378

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in, any material respect, the requirements:

- to keep accounting records in accordance with section 130 of the Charities Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities 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.

Signed: 

Date: 24 March 2026

Name: Mrs Bonnie Connolly

Relevant professional qualification(s) or body (if any): ACA

Address: Arubus Accountants
The Old Smithy, Stockton's Courtyard, Overbury, Gloucestershire, GL20 7NT

THE BURFORD RELIEF IN NEED CHARITY

England & Wales - Charity number 1036378

Accounts

BURFORD CHARITIES

THE BURFORD RELIEF IN NEED CHARITY

Report and Financial Statements

Year Ended 31 December 2024

Charity no: 1036378

**BURFORD RELIEF IN NEED CHARITY
REPORT OF THE TRUSTEES**

31 DECEMBER 2024

Charity Registered Numbers: 1036378

EX OFFICIO

The Reverend Tom Putt

NOMINATIVE TRUSTEES (Town Council)

Mrs J Tunnell-Westmacott

Mr D Cohen

CO-OPTED TRUSTEES

Mr N Street

Mrs P Barraclough

Mr D P Griffin FCA (Chairman)

Mr J . Harrington

Mrs S Doris

Mr C G Williams

Mr D Lawton (Treasurer)

Mrs K Gadd

HONORARY SECRETARY

Mrs A Youngson

Whitehill Farm

Burford

Oxon, OX18 4DT

BANKERS

TSB Bank plc, 13, High Street, Witney, Oxon, OX28 6PH

INDEPENDENT EXAMINER

B L Connolly ACA

Arubus Chartered Accountants

The Old Smithy, Stockton's Courtyard

Overbury

Glos

GL20 7NT

The trustees present their Annual Report and Receipts and Payments Accounts for the year ended 31 December 2024

Charitable Status

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Objectives and Activities

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Principal Address

The principal address is:

Whitchill Farm
Burford
Oxon
OX18 4DT

Tel: 01993-822894

Trustees

In accordance with the scheme approved by the Charity Commissioners, nominated trustees appointed by the Burford Town Council, serve for a term of four years. Co-opted trustees are appointed for a term of five years by a resolution of the trustees passed at a special meeting of the Trustees. When vacancies arise, local persons are invited by the trustees to become co-opted trustees. New trustees are briefed before their appointment is confirmed.

Meetings

The trustees held four ordinary meetings during the year.

Investment powers

The trustees have no special investment powers. Accordingly, investments are confined to narrower-range securities and common investment schemes. Cash surplus to immediate requirements is invested in the COIF Charities Deposit Fund. The Charity developed specific guidelines for investment of the proceeds of sale of the Shilton Road as set out below:

Guidelines for Investment of proceeds from sale of Shilton Land

- 1) Considered to be a long term investment with time horizon of 7-10 years.
- 2) *Capital preservation as a minimum requirement but preferably with growth around inflation rate*
- 3) Main driver is income in the range of 3-5% per annum on capital base of 1.1 mio.
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- 5) Simplicity of distributions for accounting purposes (pooled funds).
- 6) *Fund management type- some index tracking and passive management.*
Too much emphasis on active management can lead to higher costs and complexity of transactions.
Avoid non-sustainable non-ethical investments.
- 7) Charges should be no more than 1%.

Following the closure by the Health Authority of the Burford Cottage Hospital, the assets of the Burford Health Care Fund were transferred to the Burford Relief in Need Charity. Consequently, the Charity Commissioners on 15 July 2005 approved the alteration of the Scheme dated 20th February 1992 to include the relief of sickness and the preservation of health among people residing in the area of benefit. This has enabled the trustees to make grants to promote good health and assist those physically handicapped as well as assisting in education needs and helping those in financial need.

The charity does not employ any staff. The charity is administered by the trustees who do not charge for their services.

The trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The Burford Relief in Need Charity continued to give assistance to relieve hardship and distress, for educational purposes and for health care. Grants for the year totalled £10,370 of which £4,600 was a payment towards the running costs of the new day centre at Warwick Hall and £3,500 towards residents education costs.

Financial Review

As at 31 December 2024, the market value of investments of the Unrestricted Fund amounted to £205,866 whilst the market value of the Endowment Fund investments was £123,646 increased by £13,761. The trustees agreed that based on the increase in funds held in current account that 3 fixed one year term deposits should be made with Building Societies and two of these were renewed at maturity . Currently the three bonds expiring in 2025 total approx £212,500.

The Charity's policy on reserves is to retain funds so as to support the operation of the new Day Centre for the elderly and meet any contingencies that might arise for assisting people in need, for the preservation of health and to assist the education costs of students.

Plans for Future Periods

Having provided grants of £200,000 over 2015 and 2016 towards the building, fitting out and furnishings of a new day centre to replace the facility lost when the Burford Cottage Hospital was closed, the trustees continue to assist in funding some of the costs commensurate with the Relief In Need Charity objectives and activities. The day centre is now operating, so the Relief in Need Charity is assisting in supporting some of the running costs out of its income.

The trustees continue to review their provision of Almshouse accomodation in the Burford vicinity and agreed with The Charities Commission that Relief in need Funds can be expended on the acquisition of a further property up to a limit of £350,000. The Almshouse trustees completed the purchase of a further property in Burford in July 2024 and have expended funds on refurbishment. The property has been added to the Almshouse Charity portfolio and the amount of £350,000 was transferred to Almshouse accounts in time for completion at the end of June. In order to obtain some of these funds the Relief in Need sold investments at a value of £244,994, this however resulted in a realised loss of £29,237.

Statement of trustees' responsibilities

Charity Law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charities and of the surplus or deficit of the charities for that period. In preparing those statements, the trustees are required to:

- . select suitable accounting policies and then apply them consistently;
- . make judgements and estimates that are reasonable and prudent;
- . state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and;
- . prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charities will continue in operational existence.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charities and to enable them to ensure that the financial statements comply with the Charities Act 2011 and the Charity (Accounts and Reports) Regulations 2008.

They are also responsible for safeguarding the assets of the charities and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Professional advisers and relevant organisations

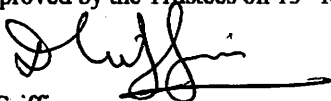
Details of professional advisers and other relevant organisations are provided at the front of these accounts.

The Trustees financial adviser is Progressive Strategic Solutions LLP, The Granary, Steadings Business Centre, Church Road, Maisemore, Gloucestershire, GL2 8EY who is authorised by the Financial Conduct Authority.

Independent Examiner

Mrs B L Connolly was first appointed as the charity's independent examiner in 2014. The trustees intend to invite Mrs B L Connolly to undertake the independent examination of the trusts for the financial year to 31 December 2025.

Approved by the Trustees on 13th March 2025 and signed on their behalf by:



D Griffin

Chairman of the Trustees



Charity Name The Burford Relief in Need Charity	No (if any) 1036378
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Receipts and payments accounts

For the period from	Period start date 01-Jan-24	To	Period end date 31-Dec-24
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	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Rents from land	2,000	-	-	2,000	2,000
Investment income	22,703	-	-	22,703	16,094
Bank interest	6,099	-	-	6,099	3,161
Donations	-	-	-	-	-
Other income Overage Shilton Road	1,336	-	-	1,336	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	32,137	-	-	32,137	21,255
A2 Asset and investment sales, (see table).					
Sale of shares	350,000	-	-	350,000	-
Sale of Shilton Road Land	-	-	-	-	116,377
Sub total	-	-	-	350,000	116,377
Total receipts	382,137	-	-	382,137	137,632
A3 Payments					
Education grants	3,500	-	-	3,500	1,175
Grants for almspeople	570	-	-	570	2,079
Health care grants	-	-	-	-	-
Other grants	1,700	-	-	1,700	7,000
Grant towards new day centre	4,600	-	-	4,600	4,400
Legal fees	-	-	-	-	-
Property repairs	-	-	-	-	-
Insurance	-	-	-	-	-
General expenses	-	-	-	-	165
Accountancy fees	288	-	-	288	355
Paid to Almshouse for Property Purchase	350,000	-	-	350,000	-
Sub total	360,658	-	-	360,658	15,174
A4 Asset and investment purchases					
Investments	-	-	-	-	-
Brewin Dolphin Portfolio Investment	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	360,658	-	-	360,658	15,174
Net of receipts/(payments)	21,479	-	-	21,479	122,458
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	353,682	-	-	353,682	231,224
Cash funds this year end	375,161	-	-	375,161	353,682



Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	TSB	23,148	-	-
	Coif Deposit Fund	43,962	-	-
	Coif Deposit Fund	95,478	-	-
	Dudley BS 1 Year Bond	85,000	-	-
	Cambridge BS 1 Year Bond	87,573	-	-
	Saffron BS 1 Year Bond	40,000	-	-
	Total cash funds	375,161	-	-

(agree balances with receipts and payments account(s))

Categories	Details	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		B3 Investment assets	Agricultural land	Endowment
	Common investment funds	Endowment	46,299	123,646
	Common investment funds	Unrestricted fund	175,770	205,866
	Embark investments (Shilton Road proceeds)	Endowment	612,954	634,281
	Brewin Dolphin Investments	Endowment	134,930	161,155

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		B4 Assets retained for the charity's own use		
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
		B5 Liabilities		
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	D Lawton	
	D P Griffin	

Independent examiner's report on the accounts

Report to the trustees/ members of The Burford Relief in Need Charity

On accounts for the year ended 31 December 2024

Charity no 1036378

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

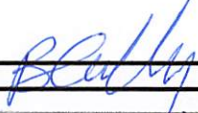
In connection with my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in, any material respect, the requirements:

- to keep accounting records in accordance with section 130 of the Charities Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities 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.

Signed:  _____

Date:  March 2025

Name: Mrs Bonnie Connolly

Relevant professional qualification(s) or body (if any): ACA

Address: Arubus Accountants
The Old Smithy, Stockton's Courtyard, Overbury, Gloucestershire, GL20 7NT

THE BURFORD RELIEF IN NEED CHARITY

England & Wales - Charity number 1036378

Accounts

BURFORD CHARITIES

THE BURFORD RELIEF IN NEED CHARITY

Report and Financial Statements

Year Ended 31 December 2023

Charity no: 1036378

**BURFORD RELIEF IN NEED CHARITY
REPORT OF THE TRUSTEES**

31 DECEMBER 2023

Charity Registered Numbers: 1036378

EX OFFICIO

The Reverend Tom Putt

NOMINATIVE TRUSTEES (Town Council)

Mrs J Tunnell-Westmacott

Mr D Cohen

CO-OPTED TRUSTEES

Mr N Street

Mrs P Barraclough

Mr D P Griffin FCA (Chairman))

Mrs G Hames

Mr J . Harrington

Mrs S Doris (Apointed August 2023)

Dr Simon Albert MBBS DRCOG MRCP (Deceased 2023)

Mr C G Williams

Mr D Lawton (Treasurer)

Mrs K Gadd (Appointed 2023)

HONORARY SECRETARY

Mrs A Youngson

Whitehill Farm

Burford

Oxon, OX18 4DT

BANKERS

TSB Bank plc, 13, High Street, Witney, Oxon, OX28 6PH

INDEPENDENT EXAMINER

B L Connolly ACA

Arubus Chartered Accountants

Units 1-4 Stockton's Courtyard

Overbury

Glos

GL20 7NT

**THE BURFORD RELIEF IN NEED CHARITY
REPORT OF THE TRUSTEES (CONTINUED)**

31 DECEMBER 2023

The trustees present their Annual Report and Receipts and Payments Accounts for the year ended 31 December 2023

Charitable Status

The Burford Relief in Need Charity is administered under a trust deed (Charity Commission reference 238,130 A/2) dated 20 February 1992.

Objectives and Activities

The main activity of the charity is in Burford with an area of benefit within a seven mile radius of the Tolsey in Burford. The Burford Relief in Need Charity provides financial assistance in case of need, and educational assistance to help recipients earn a living and to promote the relief of sickness and the preservation of health among people living in the area of benefit.

Principal Address

The principal address is:

Whitehill Farm
Burford
Oxon
OX18 4DT

Tel: 01993-822894

Trustees

In accordance with the scheme approved by the Charity Commissioners, nominated trustees appointed by the Burford Town Council, serve for a term of four years. Co-opted trustees are appointed for a term of five years by a resolution of the trustees passed at a special meeting of the Trustees. When vacancies arise, local persons are invited by the trustees to become co-opted trustees. New trustees are briefed before their appointment is confirmed.

Meetings

The trustees held four ordinary meetings during the year.

Investment powers

The trustees have no special investment powers. Accordingly, investments are confined to narrower-range securities and common investment schemes. Cash surplus to immediate requirements is invested in the COIF Charities Deposit Fund. The Charity developed specific guidelines for investment of the proceeds of sale of the Shilton Road as set out below:

Guidelines for Investment of proceeds from sale of Shilton Land

- 1) Considered to be a long term investment with time horizon of 7-10 years.
- 2) Capital preservation as a minimum requirement but preferably with growth around inflation rate
- 3) Main driver is income in the range of 3-5% per annum on capital base of 1.1 mio.
- 4) Diversified portfolio both in terms of sector (mainly defensive stable equities), and geography (some exposure to Far East for its growth potential) with less exposure to US. Liquidity remains relevant so no alternative investments.
- 5) Simplicity of distributions for accounting purposes (pooled funds).
- 6) Fund management type- some index tracking and passive management. Too much emphasis on active management can lead to higher costs and complexity of transactions. Avoid non-sustainable non-ethical investments.
- 7) Charges should be no more than 1%.

Following the closure by the Health Authority of the Burford Cottage Hospital, the assets of the Burford Health Care Fund were transferred to the Burford Relief in Need Charity. Consequently, the Charity Commissioners on 15 July 2005 approved the alteration of the Scheme dated 20th February 1992 to include the relief of sickness and the preservation of health among people residing in the area of benefit. This has enabled the trustees to make grants to promote good health and assist those physically handicapped as well as assisting in education needs and helping those in financial need.

The charity does not employ any staff. The charity is administered by the trustees who do not charge for their services.

The trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The Burford Relief in Need Charity continued to give assistance to relieve hardship and distress, for educational purposes and for health care. Grants for the year totalled £14,654 of which £4,400 was a payment towards the running costs of the new day centre at Warwick Hall and £5000 towards the cost of the re equipping of the recreation ground playing fields.

Financial Review

The Unrestricted Fund showed income in excess of expenditure totalling £122,458 for the year. As at 31 December 2023, the market value of investments of the Unrestricted Fund amounted to £204,967 an increase of £2408, whilst the market value of the Endowment Fund investments at £109,885 increased by £4,580. The final tranche of the sale of land at Shilton Road was completed in December 2021. The proceeds of Shilton Road land sale investment have increased by £29247 and now stand at £1,106,145. This year has provided a further £116,477 based on increased coverage payment from the developers. The current value of this investment held in the Brewin Dolphin portfolio is £151,405. The trustees agreed that based on the increase in funds held in current account that 3 fixed one year term deposits should be made with Building Societies. These investments should not exceed £85,000 in total in any one Society. Currently the three bonds expiring in 2024 total £210,000.

The Charity's policy on reserves is to retain funds so as to support the operation of the new Day Centre for the elderly and meet any contingencies that might arise for assisting people in need, for the preservation of health and to assist the education costs of students.

Plans for Future Periods

Having provided grants of £200,000 over 2015 and 2016 towards the building, fitting out and furnishings of a new day centre to replace the facility lost when the Burford Cottage Hospital was closed, the trustees plan to assist in funding some of the costs commensurate with the Relief In Need Charity objectives and activities. The day centre is now operating, so the Relief in Need Charity is assisting in supporting some of the running costs out of its income.

The trustees continue to review their provision of Almshouse accommodation in the Burford vicinity and have agreed with The Charities Commission that Relief in need Funds can be expended on the acquisition of a further property up to a limit of £350,000. The trustees are currently negotiating the purchase of a further property in Burford and should this be successful the property will be transferred to the Burford Almshouse Charity portfolio.

Statement of trustees' responsibilities

Charity Law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charities and of the surplus or deficit of the charities for that period. In preparing those statements, the trustees are required to:

- . select suitable accounting policies and then apply them consistently;
- . make judgements and estimates that are reasonable and prudent;
- . state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and;
- . prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charities will continue in operational existence.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charities and to enable them to ensure that the financial statements comply with the Charities Act 2011 and the Charity (Accounts and Reports) Regulations 2008.

They are also responsible for safeguarding the assets of the charities and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Professional advisers and relevant organisations

Details of professional advisers and other relevant organisations are provided at the front of these accounts.

The Trustees financial adviser is Progressive Strategic Solutions LLP, The Granary, Steadings Business Centre, Church Road, Maisemore, Gloucestershire, GL2 8EY who is authorised and regulated by the Financial Conduct Authority

Independent Examiner

Mrs B L Connolly was first appointed as the charity's independent examiner in 2014. The trustees intend to invite Mrs B L Connolly to undertake the independent examination of the trusts for the financial year to 31 December 2023.

Approved by the Trustees on 11th March 2024 and signed on their behalf by:

D Griffin
Chairman of the Trustees



Charity Name The Burford Relief in Need Charity	No (if any) 1036378
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CC16a

Receipts and payments accounts

For the period from	Period start date 01-Jan-23	To	Period end date 31-Dec-23
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Rents from land	2,000	-	-	2,000	2,000
Investment income	16,094	-	-	16,094	22,099
Bank interest	3,161	-	-	3,161	3,242
Donations	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	21,255	-	-	21,255	27,341
A2 Asset and investment sales, (see table).					
Sale of Shilton Road Land	116,377	-	-	116,377	
	-	-	-	-	
Sub total	-	-	-	116,377	
Total receipts	137,632	-	-	137,632	27,341
A3 Payments					
Education grants	1,175	-	-	1,175	1,894
Grants for almspeople	2,079	-	-	2,079	914
Health care grants	-	-	-	-	-
Other grants	7,000	-	-	7,000	284
Grant towards new day centre	4,400	-	-	4,400	4,100
Legal fees	-	-	-	-	-
Property repairs	-	-	-	-	-
Insurance	-	-	-	-	-
General expenses	165	-	-	165	103
Accountancy fees	355	-	-	355	-
Sub total	15,174	-	-	15,174	7,295
A4 Asset and investment purchases. (see table)					
	-	-	-	-	
Building Societ Investments	-	-	-	-	
Brewin Dolphin Portfolio Investment	-	-	-	-	134,931
Sub total	-	-	-	-	134,931
Total payments	15,174	-	-	15,174	142,226
Net of receipts/(payments)	122,458	-	-	122,458	- 114,885
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	231,224	-	-	231,224	346,109
Cash funds this year end	353,682	-	-	353,682	231,224

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	TSB	12,577	-	nil
	Coif Deposit Fund	41,819	-	nil
	Coif Deposit Fund	89,286	-	
	Dudley BS 1 Year bond	85,000		
	Cambridge BS 1 Year bond	85,000		
	Saffron BS 1 Year bond	40,000		
	Total cash funds		353,682	-

(agree balances with receipts and payments account(s))

OK	OK	OK
Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	Agricultural land	Endowment	13,363	-
	Common investment funds	Endowment	46,299	109,885
	Common investment funds	Unrestricted fund	175,770	204,967
	Sale Of land Shilton Road	Endowment	995,400	1,106,145
	Brewin Dolphin Investments	Endowment	134,930	151,405

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	D Lawton	
	D P Griffin	

Independent examiner's report on the accounts

Report to the trustees/ members of The Burford Relief in Need Charity

On accounts for the year ended 31 December 2023

Charity no 1036378

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in, any material respect, the requirements:

- to keep accounting records in accordance with section 130 of the Charities Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities 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.

Signed:

Date:

Name:

Relevant professional qualification(s) or body (if any):

Address:

THE BURFORD RELIEF IN NEED CHARITY

England & Wales - Charity number 1036378

Accounts

BURFORD CHARITIES

THE BURFORD RELIEF IN NEED CHARITY

Report and Financial Statements

Year Ended 31 December 2022

Charity no: 1036378

**BURFORD RELIEF IN NEED CHARITY
REPORT OF THE TRUSTEES**

31 DECEMBER 2022

Charity Registered Numbers: 1036378

EX OFFICIO

The Reverend Tom Putt

NOMINATIVE TRUSTEES (Town Council)

Mrs J Tunnell-Westmacott

Mr D Cohen

CO-OPTED TRUSTEES

Mr N Street

Mrs P Barraclough

Mr D P Griffin FCA (Chairman - appointed 06 June 2022)

Mrs G Hames

Mr J . Harrington

B J Marks OBE FCA (Chairman - resigned 06 June 2022)

Dr Simon Albert MBBS DRCOG MRCP

Mr C G Williams

Mr D Lawton (Trustee - appointed 16 March 2022) (Treasurer - appointed 06 June 2022)

HONORARY SECRETARY

Mrs A Youngson

Whitehill Farm

Burford

Oxon, OX18 4DT

BANKERS

TSB Bank plc, 13, High Street, Witney, Oxon, OX28 6PH

INDEPENDENT EXAMINER

B L Connolly ACA

Arubus Chartered Accountants

Units 1-4 Stockton's Courtyard

Overbury

Glos

GL20 7NT

**THE BURFORD RELIEF IN NEED CHARITY
REPORT OF THE TRUSTEES (CONTINUED)**

31 DECEMBER 2022

The trustees present their Annual Report and Receipts and Payments Accounts for the year ended 31 December 2022

Charitable Status

The Burford Relief in Need Charity is administered under a trust deed (Charity Commission reference 238,130 A/2) dated 20 February 1992.

Objectives and Activities

The main activity of the charity is in Burford with an area of benefit within a seven mile radius of the Tolsey in Burford. The Burford Relief in Need Charity provides financial assistance in case of need, and educational assistance to help recipients earn a living and to promote the relief of sickness and the preservation of health among people living in the area of benefit.

Principal Address

The principal address is:

Whitehill Farm
Burford
Oxon
OX18 4DT

Tel: 01993-822894

Trustees

In accordance with the scheme approved by the Charity Commissioners, nominated trustees appointed by the Burford Town Council, serve for a term of four years. Co-opted trustees are appointed for a term of five years by a resolution of the trustees passed at a special meeting of the Trustees. When vacancies arise, local persons are invited by the trustees to become co-opted trustees. New trustees are briefed before their appointment is confirmed.

Meetings

The trustees held four ordinary meetings during the year.

Investment powers

The trustees have no special investment powers. Accordingly, investments are confined to narrower-range securities and common investment schemes. Cash surplus to immediate requirements is invested in the COIF Charities Deposit Fund. The Charity developed specific guidelines for investment of the proceeds of sale of the Shilton Road as set out below:

Guidelines for Investment of proceeds from sale of Shilton Land

- 1) Considered to be a long term investment with time horizon of 7-10 years.
- 2) Capital preservation as a minimum requirement but preferably with growth around inflation rate
- 3) Main driver is income in the range of 3-5% per annum on capital base of 1.1 mio.
- 4) Diversified portfolio both in terms of sector (mainly defensive stable equities), and geography (some exposure to Far East for its growth potential) with less exposure to US. Liquidity remains relevant so no alternative investments.
- 5) Simplicity of distributions for accounting purposes (pooled funds).
- 6) Fund management type- some index tracking and passive management.
Too much emphasis on active management can lead to higher costs and complexity of transactions.
Avoid non-sustainable non-ethical investments.
- 7) Charges should be no more than 1%.

Following the closure by the Health Authority of the Burford Cottage Hospital, the assets of the Burford Health Care Fund were transferred to the Burford Relief in Need Charity. Consequently, the Charity Commissioners on 15 July 2005 approved the alteration of the Scheme dated 20th February 1992 to include the relief of sickness and the preservation of health among people residing in the area of benefit. This has enabled the trustees to make grants to promote good health and assist those physically handicapped as well as assisting in education needs and helping those in financial need.

The charity does not employ any staff. The charity is administered by the trustees who do not charge for their services.

The trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The Burford Relief in Need Charity continued to give assistance to relieve hardship and distress, for educational purposes and for health care. Grants for the year totalled £7,192 of which £4,100 was a payment towards the running costs of the new day centre at Warwick Hall.

Financial Review

The Unrestricted Fund showed income in excess of expenditure totalling £20,046 for the year. As at 31 December 2022, the market value of investments of the Unrestricted Fund amounted to £202,560 a reduction of £15,705, whilst the market value of the Endowment Fund investments at £105,305 reduced by £5,662. The final tranche of the sale of land at Shilton Road was completed in Decemebr 2021 yielding proceeds of £135,062 and a profit of £134,931. The current value of this investment held in the Brewin Dolphin portfolio is £133,101.

The Charity's policy on reserves is to retain funds so as to support the operation of the new Day Centre for the elderly and meet any contingencies that might arise for assisting people in need, for the preservation of health and to assist the education costs of students.

Plans for Future Periods

Having provided grants of £200,000 over 2015 and 2016 towards the building, fitting out and furnishings of a new day centre to replace the facility lost when the Burford Cottage Hospital was closed, the trustees plan to assist in funding some of the costs commensurate with the Relief In Need Charity objectives and activities. The day centre is now operating, so the Relief in Need Charity is assisting in supporting some of the running costs out of its income.

The Relief in Need Charity owned 1.6 acres of land on the Shilton Road. With the trustees of the Burford School Foundation Governors, who own the adjoining field, the trustees have entered into a Planning Promotion Agreement for the sale of the land. The land has received outline and subsequently detailed planning permission (subject to minor reservations). Contracts have been signed for sale of a large portion of the land with two developers and completion was achieved on two major tranches of land in July and September 2019. This yielded proceeds on sale of £1,473,317 and a profit on sale of £994,457. A third tranche of land is subject to an option agreement expiring within three years and this transaction was completed in Decemebr 2021 yielding proceeds of a further £135,062 upon completion. These proceeds will be invested accordingly to provide additional income for the Charity.

The additional income from investing the proceeds will assist in supporting the new day centre, and provide grants to promote health, assist people in need and provide assistance in education needs among people in the area of benefit.

Statement of trustees' responsibilities

Charity Law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charities and of the surplus or deficit of the charities for that period. In preparing those statements, the trustees are required to:

- . select suitable accounting policies and then apply them consistently;
- . make judgements and estimates that are reasonable and prudent;
- . state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and;
- . prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charities will continue in operational existence.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charities and to enable them to ensure that the financial statements comply with the Charities Act 2011 and the Charity (Accounts and Reports) Regulations 2008.

They are also responsible for safeguarding the assets of the charities and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Professional advisers and relevant organisations

Details of professional advisers and other relevant organisations are provided at the front of these accounts.

Independent Examiner

Mrs B L Connolly was first appointed as the charity's independent examiner in 2014. The trustees intend to invite Mrs B L Connolly to undertake the independent examination of the trusts for the financial year to 31 December 2023.

Approved by the Trustees on 13th March 2023 and signed on their behalf by:



D Griffin
Chairman of the Trustees



Charity Name The Burford Relief in Need Charity	No (if any) 1036378
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CC16a

Receipts and payments accounts

For the period from	Period start date 01-Jan-22	To	Period end date 31-Dec-22
---------------------	--------------------------------	----	------------------------------

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Rents from land	2,000	-	-	2,000	2,000
Investment income	22,099	-	-	22,099	51,334
Bank interest	3,242	-	-	3,242	1,449
Donations	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	27,341	-	-	27,341	54,783
A2 Asset and investment sales, (see table).					
Sale of Shilton Road Land	-	-	-	-	135,064
	-	-	-	-	-
Sub total	-	-	-	-	135,064
Total receipts	27,341	-	-	27,341	189,847
A3 Payments					
Education grants	1,894	-	-	1,894	-
Grants for almspeople	914	-	-	914	1,519
Health care grants	-	-	-	-	-
Other grants	284	-	-	284	3,959
Grant towards new day centre	4,100	-	-	4,100	2,050
Legal fees	-	-	-	-	1,101
Property repairs	-	-	-	-	25
Insurance	-	-	-	-	300
General expenses	103	-	-	103	-
	-	-	-	-	-
Sub total	7,295	-	-	7,295	8,954
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
Brewin Dolphin Portfolio Investment	-	-	134,931	-	-
Sub total	-	-	134,931	134,931	-
Total payments	7,295	-	134,931	142,226	8,954
Net of receipts/(payments)	20,046	-	- 134,931	- 114,885	180,893
A5 Transfers between funds	133	-	- 133	-	-
A6 Cash funds last year end	211,045	-	135,064	346,109	165,216
Cash funds this year end	231,224	-	-	231,224	346,109

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	TSB	107,153	-	nil
	Coif Deposit Fund	40,063	-	nil
	Coif Deposit Fund	84,008	-	
	Total cash funds	231,224	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

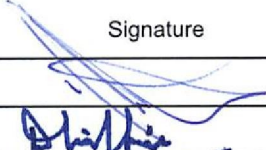

	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	Agricultural land	Endowment	13,363	-
	Common investment funds	Endowment	46,299	105,305
	Common investment funds	Unrestricted fund	175,770	202,560
	Sale Of land Shilton Road	Endowment	995,400	1,011,775
	Brewin Dolphin Investments	Endowment	134,930	133,101

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	D Lawton	13-Mar-23
	D P Griffin	13-Mar-23

Independent examiner's report on the accounts

Report to the trustees/ members of The Burford Relief in Need Charity

On accounts for the year ended 31 December 2022

Charity no 1036378

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in, any material respect, the requirements:

- to keep accounting records in accordance with section 130 of the Charities Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities 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.

Signed:



Date:

27/3/23 March 2023

Name: Mrs Bonnie Connolly

Relevant professional qualification(s) or body (if any): ACA

ACA

Address: Arbus Accountants

Units 1-4 Stockton's Courtyard, Overbury, Gloucestershire, GL20 7NT

THE BURFORD RELIEF IN NEED CHARITY

England & Wales - Charity number 1036378

Accounts

BURFORD CHARITIES

THE BURFORD RELIEF IN NEED CHARITY

Report and Financial Statements

Year Ended 31 December 2021

Charity no: 1036378

**BURFORD RELIEF IN NEED CHARITY
REPORT OF THE TRUSTEES**

31 DECEMBER 2021

Charity Registered Numbers: 1036378

EX OFFICIO

The Reverend Tom Putt

NOMINATIVE TRUSTEES (Town Council)

Mrs J Tunnell-Westmacott

Mr D Cohen

CO-OPTED TRUSTEES

Mr N Street

Mrs P Barraclough

Mr D P Griffin FCA (Treasurer)

Mrs G Hames

Mr J. Harrington

B J Marks OBE FCA (Chairman)

Dr Simon Albert MBBS DRCOG MRCP

Mr C G Williams

HONORARY SECRETARY

Mrs A Youngson

Whitehill Farm

Burford

Oxon, OX18 4DT

BANKERS

TSB Bank plc, 13, High Street, Witney, Oxon, OX28 6PH

INDEPENDENT EXAMINER

B L Connolly ACA

Arubus Chartered Accountants

Units 1-4 Stockton's Courtyard

Overbury

Glos

GL20 7NT

**THE BURFORD RELIEF IN NEED CHARITY
REPORT OF THE TRUSTEES (CONTINUED)**

31 DECEMBER 2021

The trustees present their Annual Report and Receipts and Payments Account for the year ended 31 December 2021

Charitable Status

The Burford Relief in Need Charity is administered under a trust deed (Charity Commission reference 238,130 A/2) dated 20 February 1992.

Objectives and Activities

The main activity of the charity is in Burford with an area of benefit within a seven mile radius of the Tolsey in Burford. The Burford Relief in Need Charity provides financial assistance in case of need, and educational assistance to help recipients earn a living and to promote the relief of sickness and the preservation of health among people living in the area of benefit.

Principal Address

The principal address is:

Whitehill Farm
Burford
Oxon
OX18 4DT

Tel: 01993-822894

Trustees

In accordance with the scheme approved by the Charity Commissioners, nominated trustees appointed by the Burford Town Council, serve for a term of four years. Co-opted trustees are appointed for a term of five years by a resolution of the trustees passed at a special meeting of the Trustees. When vacancies arise, local persons are invited by the trustees to become co-opted trustees. New trustees are briefed before their appointment is confirmed.

Meetings

The trustees held four ordinary meetings during the year.

Investment powers

The trustees have no special investment powers. Accordingly, investments are confined to narrower-range securities and common investment schemes. Cash surplus to immediate requirements is invested in the COIF Charities Deposit Fund. The Charity developed specific guidelines for investment of the proceeds of sale of the Shilton Road as set out below:

Guidelines for Investment of proceeds from sale of Shilton Land

- 1) Considered to be a long term investment with time horizon of 7-10 years.
- 2) Capital preservation as a minimum requirement but preferably with growth around inflation rate
- 3) Main driver is income in the range of 3-5% per annum on capital base of 1.1 mio.
- 4) Diversified portfolio both in terms of sector (mainly defensive stable equities), and geography (some exposure to Far East for its growth potential) with less exposure to US. Liquidity remains relevant so no alternative investments.
- 5) Simplicity of distributions for accounting purposes (pooled funds).
- 6) Fund management type- some index tracking and passive management. Too much emphasis on active management can lead to higher costs and complexity of transactions. Avoid non-sustainable non-ethical investments.
- 7) Charges should be no more than 1%.

Following the closure by the Health Authority of the Burford Cottage Hospital, the assets of the Burford Health Care Fund were transferred to the Burford Relief in Need Charity. Consequently, the Charity Commissioners on 15 July 2005 approved the alteration of the Scheme dated 20th February 1992 to include the relief of sickness and the preservation of health among people residing in the area of benefit. This has enabled the trustees to make grants to promote good health and assist those physically handicapped as well as assisting in education needs and helping those in financial need.

The charity does not employ any staff. The charity is administered by the trustees who do not charge for their services.

The trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The Burford Relief in Need Charity continued to give assistance to relieve hardship and distress, for educational purposes and for health care. Grants for the year totalled £7,528 of which £2,050 was a payment towards the running costs of the new day centre at Warwick Hall.

Financial Review

The Unrestricted Fund showed income in excess of expenditure totalling £45,829 for the year. As at 31 December 2021, the market value of investments of the Unrestricted Fund amounted to £218,265 an increase of £24,622 whilst the market value of the Endowment Fund investments at £110,968 increased by £9177. In addition in 2019 the Charity sold its ownership of land in the Shilton Road realising a profit of £994,457 shown in the accounts in 2019. The net proceeds were invested amounting to £995,400 and the investment was valued at £1,022,034 in December 2020 an increase of £26,634. The value of this investment as at 31 December 2021 is £1,076,898 a further increase of £54,864. The final tranche of the sale of this land was completed in Decemebr 2021 yielding proceeds of £135,062 and a profit of £134,931.

The Charity's policy on reserves is to retain funds so as to support the operation of the new Day Centre for the elderly and meet any contingencies that might arise for assisting people in need, for the preservation of health and to assist the education costs of students.

Statement of trustees' responsibilities

Charity Law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charities and of the surplus or deficit of the charities for that period. In preparing those statements, the trustees are required to:

- . select suitable accounting policies and then apply them consistently;
- . make judgements and estimates that are reasonable and prudent;
- . state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and;
- . prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charities will continue in operational existence.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charities and to enable them to ensure that the financial statements comply with the Charities Act 2011 and the Charity (Accounts and Reports) Regulations 2008.

They are also responsible for safeguarding the assets of the charities and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Professional advisers and relevant organisations

Details of professional advisers and other relevant organisations are provided at the front of these accounts.

Independent Examiner

Mrs B L Connolly was first appointed as the charity's independent examiner in 2014. The trustees intend to invite Mrs B L Connolly to undertake the independent examination of the trusts for the financial year to 31 December 2022.

Approved by the Trustees on 16th March 2022 and signed on their behalf by:



B J Marks
Chairman of the Trustees

Plans for Future Periods

Having provided grants of £200,000 over 2015 and 2016 towards the building, fitting out and furnishings of a new day centre to replace the facility lost when the Burford Cottage Hospital was closed, the trustees plan to assist in funding some of the costs commensurate with the Relief In Need Charity objectives and activities. The day centre is now operating, so the Relief in Need Charity is assisting in supporting some of the running costs out of its income.

The Relief in Need Charity owned 1.6 acres of land on the Shilton Road. With the trustees of the Burford School Foundation Governors, who own the adjoining field, the trustees have entered into a Planning Promotion Agreement for the sale of the land. The land has received outline and subsequently detailed planning permission (subject to minor reservations). Contracts have been signed for sale of a large portion of the land with two developers and completion was achieved on two major tranches of land in July and September 2019. This yielded proceeds on sale of £1,473,317 and a profit on sale of £994,457, as recorded in the accounts for 2019. A third tranche of land was subject to an option agreement expiring within three years and this transaction was completed in Decemebr 2021 yielding proceeds of a further £135,062 upon completion. These proceeds will be invested accordingly to provide additional income for the Charity.

The additional income from investing the proceeds will assist in supporting the new day centre, and provide grants to promote health, assist people in need and provide assistance in education needs among people in the area of benefit.

Charity Name The Burford Relief In Need Charity	No (if any) 1036378
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Receipts and payments accounts

For the period from	Period start date 01-Jan-21	To	Period end date 31-Dec-21
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	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Rents from land	2,000	-	-	2,000	1,740
Investment income	51,334	-	-	51,334	23,255
Bank interest	1,449	-	-	1,449	4,087
Donations	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	54,783	-	-	54,783	29,082
A2 Asset and investment sales, (see table).					
Sale of Shilton Road Land	-	-	135,064	135,064	-
	-	-	-	-	-
Sub total	-	-	135,064	135,064	-
Total receipts	54,783	-	135,064	189,847	29,082
A3 Payments					
Education grants	-	-	-	-	-
Grants for almspeople	1,519	-	-	1,519	1,337
Health care grants	-	-	-	-	-
Other grants	3,959	-	-	3,959	1,300
Grant towards new day centre	2,050	-	-	2,050	2,050
Legal fees	1,101	-	-	1,101	138
Property repairs	25	-	-	25	-
Insurance	300	-	-	300	400
	-	-	-	-	-
	-	-	-	-	-
Sub total	8,954	-	-	8,954	5,225
A4 Asset and investment purchases, (see table)					
	-	-	-	-	995,400
	-	-	-	-	-
Sub total	-	-	-	-	995,400
Total payments	8,954	-	-	8,954	1,000,625
Net of receipts/(payments)	45,829	-	135,064	180,893	- 971,543
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	165,216	-	-	165,216	1,136,759
Cash funds this year end	211,045	-	135,064	346,109	165,216



Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	TSB	224,797	-	nil
	Coif Deposit Fund	39,876	-	nil
	Coif Deposit Fund	81,638	-	
	Total cash funds	346,109	-	-

(agree balances with receipts and payments account(s))


	OK Unrestricted funds to nearest £	OK Restricted funds to nearest £	Agreement Error Endowment funds to nearest £
B2 Other monetary assets			
Details	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			
Details	Endowment	13,363	-
Agricultural land	Endowment	46,299	110,987
Common investment funds	Unrestricted fund	175,770	218,285
Common investment funds	Endowment	995,400	1,076,898
Sale Of land Shilton Road		-	-

	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			
Details		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			
Details		-	
		-	
		-	
		-	
		-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	B J Marks	16-Mar-22
	D P Griffin	16-Mar-22

Independent examiner's report on the accounts

Report to the trustees/ members of The Burford Relief In Need Charity

On accounts for the year ended 31 December 2021

Charity no 1036378

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in, any material respect, the requirements:

- to keep accounting records in accordance with section 130 of the Charities Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities 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.

Signed: 

Date: 22/3/2022

Name: Mrs Bonnie Connolly

Relevant professional qualification(s) or body (if any): ACA

Address: Arbus Chartered Accountants
Units 1-4 Stockton's Courtyard, Overbury, Gloucestershire, GL20 7NT