

**THE JORDAN MAX GOODMAN CHARITABLE TRUST**

Charity Number 1053984

**REPORT AND FINANCIAL STATEMENTS**

**YEAR ENDED**

**5 APRIL 2024**

**THE JORDAN MAX GOODMAN CHARITABLE TRUST**

**STATEMENT OF ACCOUNTS**

Year ended 5 April 2024

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**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF  
THE JORDAN MAX GOODMAN CHARITABLE TRUST**

I report to the charity trustees on my examination of The Jordan Max Goodman Charitable Trust ("the charity") for the year ended 5 April 2024.

**Responsibilities and basis of report**

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. the accounts do not accord with those records or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



Glen Bott FCA  
Cooper Parry Group Limited  
Sky View  
Argosy Road  
East Midlands Airport  
Castle Donington  
Derby  
DE74 2SA

Date: 8 December 2024

## **THE JORDAN MAX GOODMAN CHARITABLE TRUST**

### **TRUSTEES' REPORT**

**At 5 April 2024**

The trustees present their annual report together with the financial statements of The Jordan Max Goodman Charitable Trust ("the charity") for the year ended 5 April 2024.

The trustees confirm that the annual report and financial statements of the charity comply with the Charities Act 2011, the requirements of the charity's governing document and the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities".

#### **Reference and administrative details of the charity and its trustees**

The Jordan Max Goodman Charitable Trust  
Charity number 1053984

Correspondence address:

Amberley  
Totteridge Green  
London  
N20 8PE

Trustees who served during the year were:

Mr A Goodman  
Mrs I Goodman  
Mr T Goodman

#### **Structure, governance and management**

The charity was formed under a trust deed dated 21 February 1996. The management of the charity is vested in the body of trustees.

Future trustees shall be appointed by resolution of the existing trustees.

#### **Objectives and activities**

The trustees shall hold the trust fund and its income upon trust to apply them for such charitable purposes and to make donations to such charitable institution or institutions at such time or times in such manner as the trustees in their absolute discretion think fit.

#### **Achievements and performance**

During the year the charity made donations of £144,603 (2023: £162,016) to various organisations. Total incoming resources amounted to £163,557 (2023: £146,279) The charity will continue to meet its objectives in line with its charitable purpose. The trustees confirm that they have considered the Commission's guidance on public benefit when reviewing the charity's objectives and activities.

#### **Risk**

An assessment of the potential risks faced by the charity has been undertaken by the trustees and they deem sufficient controls are in place to mitigate the risks faced.

#### **Financial review**

The Statement of Financial Activities on page 5 shows a net surplus for the year of £17,170 (2023: deficit of £18,416). The balance of unrestricted funds as at 5 April 2024 was £240,749 (2023: £223,579).

#### **Financial Reserves Policy**

It is the policy of the charity to maintain unrestricted funds which have not been designated for a specific use at a level as the trustees see fit.

## THE JORDAN MAX GOODMAN CHARITABLE TRUST

### TRUSTEES' REPORT (continued)

At 5 April 2024

#### Trustees' Responsibilities Statement

The trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

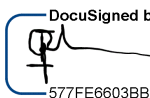
The law applicable to charities in England & Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- 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;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charities (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

This report was approved by the trustees and signed on their behalf by:

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**Mrs I Goodman**

Date: 5 December 2024

THE JORDAN MAX GOODMAN CHARITABLE TRUST

BALANCE SHEET

At 5 April 2024

	Total Unrestricted Funds 2024 £	Total Unrestricted Funds 2023 £
<b>Current Assets</b>		
Income tax recoverable	32,608	47,911
Handelsbanken account	208,141	175,668
<b>Net assets</b>	240,749	223,579
<b>Funds</b>		
Unrestricted funds	240,749	223,579

The financial statements were approved and signed by the trustees on

DocuSigned by:  
  
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**Mrs I Goodman**

Date: 5 December 2024

The notes on pages 6-7 form part of these financial statements.

**THE JORDAN MAX GOODMAN CHARITABLE TRUST**

**STATEMENT OF FINANCIAL ACTIVITIES**

**Year ended 5 April 2024**

	Note	Unrestricted Funds 2024 £	Unrestricted Funds 2023 £
<b>Incoming resources</b>	1		
Donations received		130,430	117,023
Tax recoverable		33,127	29,256
Interest received		-	-
		_____	_____
<b>Total incoming resources</b>		163,557	146,279
		_____	_____
<b>Resources expended</b>			
<b>Charitable activities</b>			
Grants and donations made	3	144,603	162,016
Governance costs		1,784	2,679
		_____	_____
<b>Total resources expended</b>		146,387	164,695
		_____	_____
<b>Net surplus/(deficit) for the period</b>		17,170	(18,416)
		_____	_____
<b>Net movement in funds</b>		17,170	(18,416)
<b>Balance brought forward at 6 April 2023</b>		223,579	241,995
		_____	_____
<b>Balance carried forward at 5 April 2024</b>		240,749	223,579
		_____	_____

The statement of financial activities includes all gains and losses recognised in the year. All incoming resources and resources expended derive from continuing activities.

The statement of financial activities incorporates the income and expenditure account.

The notes on pages 6-7 form part of these financial statements.

## **THE JORDAN MAX GOODMAN CHARITABLE TRUST**

### **NOTES TO THE ACCOUNTS**

**Year ended 5 April 2024**

#### **1. ACCOUNTING POLICIES**

##### **Basis of accounting**

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102), the Charities Act 2011 and UK Generally Accepted Practice.

The financial statements have been prepared on a going concern basis under the historical cost convention. The financial statements are prepared in sterling which is the functional currency of the charity.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

##### **Income**

Donations are recognised in the Statement of Financial Activities when received.

Incoming resources from tax reclaims are included in the Statement of Financial Activities at the same time as the gift to which they relate.

##### **Grants and Donations**

Grants and donations made during the year are accounted for when they are paid.

#### **2. INFORMATION REGARDING TRUSTEES**

The trustees do not receive any remuneration or expenses from the charity.



**THE JORDAN MAX GOODMAN CHARITABLE TRUST****NOTES TO THE ACCOUNTS****Year ended 5 April 2024****3. GRANTS AND DONATIONS MADE**

The trustees report that during the year they made the following grants and donations:

	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Action Aid	180	173
Alzheimer's Society	-	500
Camp Simcha	-	45,000
Chabad Lubavitch of Nottingham	-	500
Chai Cancer Care	15,000	20,000
Community Security Trust	20,000	-
Compassion in World	480	480
Finchley Reform Synagogue	2,000	1,000
Food Bank Aid Campaign	10,000	5,000
Four Paws UK	360	360
Goods for Good	6,000	-
Grief Encounter	16,000	15,000
Helping Rhinos	500	-
Human Society International	480	480
Jewish Association for Mental Health	1,000	-
Jewish Care	25,000	25,250
Jnetics	-	500
Kosher Care	500	-
Leket UK	5,000	-
Little Hearts Matter	480	480
Myisrael	5,000	5,000
Norwood	19,373	19,193
Peta	600	600
Project Lily	500	500
Stand With Us UK	3,000	-
Summer Hype	2,000	-
Supporters of Israel's Dependents	2,500	-
The Anne Frank Trust UK	1,650	-
UJIA	7,000	-
World Jewish Relief	-	20,000
YAD Vashem UK Foundation	-	2,000
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	144,603	162,016
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