



Trustees' Annual Report for the period

	Period start date				Period end date		
	Day	Month	Year		Day	Month	Year
From	6	04	2022	To	5	04	2023

Section A Reference and administration details

Charity name

Other names charity is known by

Registered charity number (if any)

Yarmer, Ilbert Road

Thurlestone,

Devon

Postcode

TQ7 3NY

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Declan Dwyer	Chairman		
2	Susan Dwyer	secretary		
3	John Hart			
4	Nuala Kalfayan			
5	Candi Hart			
6	David Chudleigh			
7	Kieran Dwyer			
8	Freddie Kalfayan	Treasurer		
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
------	-----------------------------------

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

--

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document
(eg. trust deed, constitution)

Trust Deed

How the charity is constituted
(eg. trust, association, company)

Trust

Trustee selection methods
(eg. appointed by, elected by)

Trustees select & appoint

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

Works with local schools to identify financially disadvantaged students and to finance them through further education.

A family trust with outside monitors.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

Further education, professional training or sports training for beneficiaries who in the opinion of the trustees would benefit from financial assistance and have shown ability to benefit from such assistance, and in most cases living away from home.

<p>Advancing other charitable purposes including buildings, educational or sporting, for younger people or endowments to educational establishments</p>
<p>Select and give bursaries to up to eighteen school leavers a year going on to or already in further education</p>

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Additional details of objectives and activities (Optional information)

Rely on teacher selection, references and annual interview.

Students supply a report at the end of each university term and some are asked for a tutor report in addition.

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

Fourteen university students at ten different universities received assistance.

Section E

Financial review

Brief statement of the charity's policy on reserves

Financially we operate conservatively. We do not expect to spend significantly above the gross income of our invested fund,, and expenses are minimal.

Details of any funds materially in deficit

Nil

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Only source of funds have been Gift Aid from the trustees and income from the invested fund

The fund is invested via Rathbones at level 4 risk (max risk 6).

Section F**Other optional information****Section G****Declaration**

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

D. Dwyer

Full name(s)

Declan Dwyer

Position (eg Secretary, Chair, etc)

Chair Person

Date

17th Feb 2024



CHARITY COMMISSION
FOR ENGLAND AND WALES

T DWYER_HART FOUNDATION

No (if any)

Receipts and payments accounts

CC16a

For the period
from

Period start date
4/6/2022

To

4/5/2023

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
INVESTMENT INCOME	16,362	-	-	16,362	13,388
	-	-	-	-	-
GIFT AID	-	-	26,995	26,995	12,247
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	16,362	-	26,995	43,357	25,635
A2 Asset and investment sales, (see table).					
	-	-	136,341	136,341	35,452
	-	-	-	-	-
Sub total	-	-	136,341	136,341	35,452
Total receipts	16,362	-	163,336	179,698	61,087
A3 Payments					
TRAVEL EXPENSES	350	-	-	350	435
COMPUTER EQUIPMENT	231	-	-	231	634
POSTAGE	72	-	-	72	-
BANK CHARGES	60	-	-	60	15
GRANT PAYMENTS	23,564	-	-	23,564	17,128
WEB PAGE	-	-	-	-	154
INVESTMENT MANAGEMENT FEES	-	-	3,912	3,912	4,310
	-	-	-	-	-
	-	-	-	-	-
Sub total	24,277	-	3,912	28,189	22,676
A4 Asset and investment purchases, (see table)					
	-	-	100,478	100,478	86,043
	-	-	-	-	-
Sub total	-	-	100,478	100,478	86,043
Total payments	24,277	-	104,390	128,667	108,719
Net of receipts/(payments)	7,915	-	58,946	51,031	47,632
A5 Transfers between funds	7,915	-	7,915	-	-
A6 Cash funds last year end	2,705	-	4,978	7,683	-
Cash funds this year end	13,125	-	71,839	58,714	47,632

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	HSBC	7,148	-	
	RATHBONES	-	-	50,985
		-	-	-
	Total cash funds	7,148	-	50,985
	(agree balances with receipts and payments account(s))	Agreement Error	OK	Agreement Error
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	Details	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	RATHBONES INVESTMENTS	ENDOWMENT	633,825	721,012
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name

THE DWYER-HART FOUNDATION

On accounts for the year ended

05 April 2023

Charity no (if any)

1090297

Set out on pages

SEPARATE DOCUMENT

(remember to include the page numbers of additional sheets)

Responsibilities and basis of report

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended
05 / 04 / 2023

As the charity trustees of the Trust, 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 Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed 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 (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

** Please delete the words in the brackets if they do not apply.*

Signed:

R. Thorne

Date:

17 FEB 24

Name:

RAYMOND THORNE

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

CHARTERED ACCOUNTANT

IER

Address:

PECKWATER

EDDYSTONE ROAD, THURLESTONE

DEVON TQ7 3NU

Section B

Disclosure

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

NONE