

# THE PERRY FAMILY CHARITABLE TRUST

England & Wales · Charity number 1094675

## Details

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**Status** Registered

**Legal form** Other

**Registered** 2002-11-19

**Register** [View on the Charity Commission register](#)

## Contact

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**Address** Bridges Stone Mill  
Bridges Stone  
Alfrick  
Worcester  
WR6 5HR

**Phone** 01886833290

**Email** [Perrytrust@aol.com](mailto:Perrytrust@aol.com)

## Activities

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**Objects:** 1. TO RELIEVE IN CASES OF NEED, HARDSHIP OR DISTRESS PERSONS WHO ARE RESIDENT IN THE WEST MIDLANDS2. TO PROVIDE RELIEF OR SUPPORT FOR PERSONS RESIDING AT OR RECEIVING CARE OR TREATMENT IN ANY HOSPICE OR HOME FOR THOSE WHO ARE HANDICAPPED OR TERMINALLY ILL OR ELDERLY OR INFORM OR ON THEIR DISCHARGE WHO ARE SICK. CONVALESCENT, DISABLED, HANDICAPPED, INFIRM OR IN NEED OF FINANCIAL ASSISTANCE3. TO FURTHER THE EDUCATION (INCLUDING SOCIAL AND PHYSICAL TRAINING) OF CHILDREN ATTENDING A SCHOOL OF ANY DENOMINATION IN THE WEST MIDLANDS4. TO AWARD SCHOLARSHIPS, EXHIBITIONS, BURSARIES OR MAINTENANCE ALLOWANCES TENABLE AT ANY SCHOOL, UNIVERSITY OR OTHER EDUCATION ESTABLISHMENT APPROVED BY THE TRUSTEES TO PERSONS UNDER TWENTY-FIVE YEARS OF AGE WHO, OR WHOSE PARENTS OR GUARDIANS, ARE RESIDENT IN THE WEST MIDLANDS OR WHO ARE ATTENDING OR WHO HAVE FOR NOT LESS THAN THREE YEARS ATTENDED AN EDUCATIONAL ESTABLISHMENT IN THE WEST MIDLANDS AND WHO ARE IN NEED OF FINANCIAL ASSISTANCE AND TO PROVIDE FINANCIAL ASSISTANCE, OUTFITS, CLOTHING, TOOLS, INSTRUMENTS OR BOOKS TO SUCH PERSONS ON LEAVING SCHOOL, UNIVERSITY OR OTHER EDUCATIONAL ESTABLISHMENT TO PREPARE THEM FOR OR ASSIST THEIR ENTRY INTO A TRADE PROFESSION OR SERVICE AND TO AWARD TO SUCH PERSONS GRANTS OR MAINTENANCE ALLOWANCES TO ENABLE THEM TO TRAVEL WHETHER IN THE UNITED KINGDOM OR ABROAD IN FURTHERANCE OF THEIR EDUCATION AND OTHERWISE TO FURTHER THE EDUCATION OF SUCH PERSONS5. TO EDUCATE AND ASSIST YOUNG PERSONS THROUGH THEIR LEISURE TIME ACTIVITIES SO AS TO DEVELOP THEIR PHYSICAL, MENTAL AND SPIRITUAL CAPACITIES THAT THEY MAY GROW TO FULL MATURITY AS INDIVIDUALS AND MEMBERS OF SOCIETY AND THAT THEIR CONDITIONS OF LIFE MAY BE IMPROVED6. TO SUPPORT THE ARTS IN THE WEST MIDLANDS, IN PARTICULAR BY MAKING GRANTS TO INSTITUTIONS AND BY PROMOTING PUBLIC EXHIBITIONS , LECTURES, CONCERTS, RECITALS AND OTHER EVENTS

**Activities:** Small grants to meet special needs and to support education, training and the arts in the West Midlands.

## Classification

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- **How:** Makes Grants To Individuals, Makes Grants To Organisations
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives, Disability, The Prevention Or Relief Of Poverty, Arts/culture/heritage/science, Amateur Sport
- **Who:** Children/young People, Elderly/old People, People With Disabilities, Other Charities Or Voluntary Bodies

## Geography

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- **Area of benefit:** PERSONS WHO ARE RESIDENT IN THE WEST MIDLANDS
- Herefordshire
- Shropshire
- Warwickshire
- Worcestershire

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£9,665	£20,696	-	-
2024-03-31	£17,176	£53,060	-	-
2023-03-31	£59,649	£33,912	-	-
2022-03-31	£24,600	£30,500	-	-
2021-03-31	£4,668	£23,689	-	-

## Trustees

Name	Role	Appointed
<b>SIR MICHAEL PERRY GBE</b>	Chair	
CAROLYN CLARE EYTON		
LADY JOAN MARY PERRY		
WILLIAM BRIAN STALLARD		

**THE PERRY FAMILY CHARITABLE TRUST**

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# Accounts

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**THE PERRY FAMILY CHARITABLE TRUST**

**TRUSTEES REPORT FOR THE YEAR ENDED 31 MARCH 2023**

The Trustees present their Annual Report and Accounts for the year ended 31 March 2023.

**Activities**

The objects of the Trust are to provide small grants to meet special needs and to support education, training and the arts in the West Midlands.

**Results**

The results are shown on page 2 of the Accounts and the Trustees consider that the proceedings during the year were satisfactory.

**Trustees**

The present Trustees are as set out on the report of Officers and Professional Advisors.

**Accountants**

The Trustees propose the reappointment of Azets (Holdings) Limited as Accountants of the Trust.

**BY ORDER OF THE BOARD**

Sir Michael Perry G.B.E  
CHAIRMAN  
5th September 2023

THE PERRY FAMILY CHARITABLE TRUST

RECEIPTS AND PAYMENTS ACCOUNT  
YEAR ENDED 31 MARCH 2023

	Year to 31.03.23		Year to 31.03.22	
	£	£	£	£
<b>INCOME</b>				
Donations Received		55,000		20,000
Dividends Received		<u>4,649</u>		<u>4,600</u>
		59,649		24,600
<b>EXPENSES</b>				
Donations paid to other Charities	33,600		30,200	
Administration Fees	-		-	
Accountancy Charges	<u>312</u>		<u>300</u>	
		33,912		30,500
<b>EXCESS OF INCOME OVER EXPENDITURE FOR THE YEAR</b>		<u>25,737</u>		<u>(5,900)</u>

**THE PERRY FAMILY CHARITABLE TRUST**

**NOTES TO THE ACCOUNTS  
FOR THE  
YEAR ENDED 31 MARCH 2023**

**1 Accounting Convention**

The Accounts have been prepared under the Historical Cost Convention.

**2 Trustee Benefits**

No benefits have been available to the Trustees during the year.

**3 Investments**

The investments held at 31 March 2023 were 3,150 shares in Unilever PLC the cost of which, as shown in the Balance Sheet was £39,410.

The market value of the holding in Unilever PLC at 31 March 2023 amounts to £135,041 and thus there is an unrealised surplus of £95,631.