

# Trustees' annual report for the period



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Period start date 

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 0 | 1 | 0 | 1 | 2 | 4 |
|---|---|---|---|---|---|

 Period end date 

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 3 | 1 | 1 | 2 | 2 | 4 |
|---|---|---|---|---|---|

Charity name 

|   |   |   |   |   |   |   |   |   |  |   |   |   |   |   |   |  |   |   |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|---|---|--|---|---|---|---|---|---|--|---|---|---|---|---|---|---|---|---|
| L | I | V | E | R | P | O | O | L |  | R | E | F | O | R | M |  | S | Y | N | A | E | G | O | G | E |
|---|---|---|---|---|---|---|---|---|--|---|---|---|---|---|---|--|---|---|---|---|---|---|---|---|---|

Charity No  
(if any)

|   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|
| 1 | 0 | 9 | 8 | 1 | 8 | 1 |
|---|---|---|---|---|---|---|

## Objectives and Activities

|                                                                                                                                                                      | SORP reference     |                                                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|-------------------------------------------------------------------------------------------|
| Summary of the purposes of the charity as set out in its governing document                                                                                          | Para 1.17          | THE ADVANCEMENT OF REFORM JUDAISM IN THE LIVERPOOL CITY REGION                            |
| Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts. | Para 1.17 and 1.19 | THE PROVISION OF REFORM JUDAISM SERVICES, YOUTH ACTIVITIES, EDUCATION AND INTERFAITH WORK |
| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit                                         | Para 1.18          | CONFIRMED                                                                                 |

## Additional information (optional)

You may choose to include further statements where relevant about:

|                                                                  | SORP reference |     |
|------------------------------------------------------------------|----------------|-----|
| Policy on grant making                                           | Para 1.38      | N/A |
| Policy on social investment including program related investment | Para 1.38      | N/A |
| Contribution made by volunteers                                  | Para 1.38      | N/A |
| Other                                                            |                |     |

## Achievements and Performance

|                                                                                                                                                                                                 | SORP reference |                                                                                                                                                                                                                                      |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole. | Para 1.20      | WE CONTINUE TO PROVIDE A PLACE OF WORSHIP AND WEEKLY SERVICES FOR OUR CONGREGATION. WE HOLD ADULT EDUCATION, CULTURAL AND SOCIAL ACTIVITIES AND OFFER SUNDAY SCHOOL AND YOUTH CLUBS FOR OUR CHILDREN FROM TODDLERS TO EIGHTEEN YEARS |

### Additional information (optional)

You may choose to include further statements where relevant about:

|                                                              | SORP reference |     |
|--------------------------------------------------------------|----------------|-----|
| Achievements against objectives set                          | Para 1.41      | N/A |
| Performance of fundraising activities against objectives set | Para 1.41      | N/A |
| Investment performance against objectives                    | Para 1.41      | N/A |
| Other                                                        |                |     |

## Financial Review

|                                                                                  | SORP reference |                                        |
|----------------------------------------------------------------------------------|----------------|----------------------------------------|
| Review of the charity's financial position at the end of the period              | Para 1.21      | FINANCES ARE ON A SOUND FOOTING        |
| Statement explaining the policy for holding reserves stating why they are held   | Para 1.22      | NO RESERVES                            |
| Amount of reserves held                                                          | Para 1.22      | N/A                                    |
| Reasons for holding zero reserves                                                | Para 1.22      | INCOMES & EXPENDITURE ARE FAIRLY EQUAL |
| Details of fund materially in deficit                                            | Para 1.24      | N/A                                    |
| Explanation of any uncertainties about the charity continuing as a going concern | Para 1.23      | NO UNCERTAINTIES                       |

### Additional information (optional)

You may choose to include further statements where relevant about:

|                                                                                 | SORP reference |  |
|---------------------------------------------------------------------------------|----------------|--|
| The charity's principal sources of funds (including any fundraising)            | Para 1.47      |  |
| Investment policy and objectives including any social investment policy adopted | Para 1.46      |  |
| A description of the principal risks facing the charity                         | Para 1.46      |  |
| Other                                                                           |                |  |

## Structure, Governance and Management

| Description of charity's trusts:                                                                                                                                          | SORP reference |                                 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|---------------------------------|
| Type of governing document<br>(trust deed, royal charter)                                                                                                                 | Para 1.25      | BY CONSTITUTION                 |
| How is the charity constituted?<br>(e.g. unincorporated association, CIO)                                                                                                 | Para 1.25      | UNINCORPORATED ASSOCIATION      |
| Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees | Para 1.25      | ELECTED BY<br>SYNAGOGUE COUNCIL |

### Additional information (optional)

You may choose to include further statements where relevant about:

|                                                                                           | SORP reference |  |
|-------------------------------------------------------------------------------------------|----------------|--|
| Policies and procedures adopted for the induction and training of trustees                | Para 1.51      |  |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51      |  |
| Relationship with any related parties                                                     | Para 1.51      |  |
| Other                                                                                     |                |  |

## Reference and Administrative details

|                             |                                                |
|-----------------------------|------------------------------------------------|
| Charity name                | LIVERPOOL REFORM SYNAGOGUE                     |
| Other name the charity uses | LIVERPOOL PROGRESSIVE SYNAGOGUE                |
| Registered charity number   | 1098181                                        |
| Charity's principal address | 28, CHURCH ROAD NORTH,<br>LIVERPOOL<br>L15 6TF |

### 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  | ALAN RAE      | PRESIDENT       | -                                 | COUNCIL                                                       |
| 2  | PAUL LEVINSON | CHAIRMAN        | -                                 | "                                                             |
| 3  | JOHN ABLETT   | TREASURER       | -                                 | "                                                             |
| 4  |               |                 |                                   |                                                               |
| 5  |               |                 |                                   |                                                               |
| 6  |               |                 |                                   |                                                               |
| 7  |               |                 |                                   |                                                               |
| 8  |               |                 |                                   |                                                               |
| 9  |               |                 |                                   |                                                               |
| 10 |               |                 |                                   |                                                               |
| 11 |               |                 |                                   |                                                               |
| 12 |               |                 |                                   |                                                               |
| 13 |               |                 |                                   |                                                               |
| 14 |               |                 |                                   |                                                               |
| 15 |               |                 |                                   |                                                               |
| 16 |               |                 |                                   |                                                               |
| 17 |               |                 |                                   |                                                               |
| 18 |               |                 |                                   |                                                               |
| 19 |               |                 |                                   |                                                               |
| 20 |               |                 |                                   |                                                               |

## Reference and Administrative details

(cont)

Corporate trustees – names of the directors at the date the report was approved

| Director name |  |  |
|---------------|--|--|
|               |  |  |
|               |  |  |
|               |  |  |
|               |  |  |
|               |  |  |
|               |  |  |

Name of trustees holding title to property belonging to the charity

| Trustee name  | Dates acted if not for whole year |  |
|---------------|-----------------------------------|--|
| ALAN RAE      |                                   |  |
| PAUL LEVINSON |                                   |  |
| JOHN ABLETT   |                                   |  |
|               |                                   |  |
|               |                                   |  |
|               |                                   |  |

## Funds held as custodian trustees on behalf of others

|                                                                                                                               |     |
|-------------------------------------------------------------------------------------------------------------------------------|-----|
| Description of the assets held in this capacity                                                                               | N/A |
| Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects |     |
| Details of arrangements for safe custody and segregation of such assets from the charity's own assets                         |     |

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

| Type of adviser | Name | Address |
|-----------------|------|---------|
|                 |      |         |
|                 |      |         |
|                 |      |         |
|                 |      |         |

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

|  |
|--|
|  |
|--|

#### Exemptions from disclosure

Reason for non-disclosure of key personnel details

|  |
|--|
|  |
|--|

#### Other optional information

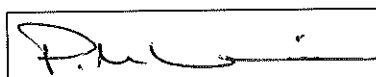
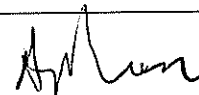
|  |
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|  |
|--|

## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

Full name(s)

PAUL MARK LEVINSON

ALAN KEITH RAE

Position (eg Secretary,  
Chair, etc)

CHAIRMAN

PRESIDENT

Date

28/10/25

**Liverpool Reform Synagogue**  
**Income and Expenditure Account**  
**for the year ended**  
**31 December 2024**

|                                         | £      | 2024<br>£             | £      | 2023<br>£             |
|-----------------------------------------|--------|-----------------------|--------|-----------------------|
| <b>INCOME</b>                           |        |                       |        |                       |
| Subscriptions & Gift Aid                | 28,497 |                       | 28,079 |                       |
| Conversion Class                        | 2,982  |                       |        |                       |
| Donations for use of Hall               | 2,020  |                       | 3,585  |                       |
| Communal Seder                          | 1,159  |                       | 877    |                       |
| High Holyday Appeal                     | 2,468  |                       | 1,678  |                       |
| Profit from Events & Project            | 277    |                       |        |                       |
| Non Members Funerals                    | 7,500  |                       | 4,750  |                       |
| Tikkun Olam Day                         | 877    |                       | 126    |                       |
| Machzorim                               | 2,262  |                       |        |                       |
|                                         |        | <u>48,042</u>         |        | <u>39,095</u>         |
| <b>EXPENDITURE</b>                      |        |                       |        |                       |
| Ministerial and Lay Expenses            | 24,681 |                       | 19,604 |                       |
| Synagogue Upkeep                        | 19,398 |                       | 20,638 |                       |
| Administration Expenses                 | 103    |                       | 352    |                       |
| Levies and Donations                    | 3,909  |                       | 1,944  |                       |
| Exceptional Items                       | 1,142  |                       | 2,088  |                       |
|                                         |        | <u>49,233</u>         |        | <u>44,626</u>         |
| <b>Surplus ( Deficit ) For The Year</b> |        | <u><u>- 1,191</u></u> |        | <u><u>- 5,531</u></u> |

Liverpool Reform Synagogue

Expenditure Schedule

for the year ended

31 December 2024

|                                               | £      | 2024<br>£     | £      | 2023<br>£     |
|-----------------------------------------------|--------|---------------|--------|---------------|
| <b>Ministerial Expenses</b>                   |        |               |        |               |
| Rabbinical Fees                               | 22,979 |               | 16,693 |               |
| Lay Fees                                      | 150    |               | 2,550  |               |
| Leo Baeck Student Fees                        | 1,552  |               | 361    |               |
|                                               |        | <u>24,681</u> |        | <u>19,604</u> |
| <b>Synagogue Upkeep</b>                       |        |               |        |               |
| Cleaning and Materials                        | 3,416  |               | 3,162  |               |
| Lighting, Heating & Broadband                 | 8,347  |               | 8,631  |               |
| Insurance                                     | 4,261  |               | 4,009  |               |
| Rates and Water                               | 287    |               | 242    |               |
| Repairs and Renewals                          | 1,715  |               | 3,073  |               |
| Building Alarm Maintenance                    | 774    |               | 696    |               |
| Fire Alarm / Extinguishers Maintenance        | 518    |               | 825    |               |
| Heating Boiler Maintenance                    | 80     |               |        |               |
|                                               |        | <u>19,398</u> |        | <u>20,638</u> |
| <b>Administration Expenses</b>                |        |               |        |               |
| Printing, Postage & Stationery                |        |               |        |               |
| Bank Charges                                  | 103    |               | 109    |               |
| Cheder, Youth & Social club                   |        |               | 243    |               |
| Sundry, Presentations and Books               |        |               |        |               |
|                                               |        | <u>103</u>    |        | <u>352</u>    |
| <b>Levies and Donations</b>                   |        |               |        |               |
| Movement for Reform Judaism Levy              | 2,914  |               | 449    |               |
| Merseyside Jewish Representative Council Levy | 500    |               | 1,000  |               |
| Board of Deputies Voluntary Levy              | 495    |               | 495    |               |
| Yiskor                                        |        |               |        |               |
|                                               |        | <u>3,909</u>  |        | <u>1,944</u>  |
| <b>Exceptional Items</b>                      |        |               |        |               |
| Marquee                                       |        |               | 1,629  |               |
| Bursary                                       | 95     |               |        |               |
| Seder                                         | 1,047  |               | 459    |               |
| Youth Club                                    |        |               |        |               |
|                                               |        | <u>1,142</u>  |        | <u>2,088</u>  |
| <b>Total Expenditure</b>                      |        | <u>49,233</u> |        | <u>44,626</u> |



Section A

Independent Examiner's Report

Report to the trustees/  
members of

Charity Name  
Liverpool Reform Synagogue

On accounts for the year  
ended

2024

Charity no  
(if any)

1098181

Set out on pages

1 to 4

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2024.

Responsibilities and  
basis of report

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 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.

Signed:

Date: 26/10/2025

Name:

Richard Freeman

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

BA (Hons) in Economics  
MSc in Economics

Address:

75 Cuckoo Lane

Liverpool

**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.**

Not applicable