

THE ELOISE AND KATIE MEMORIAL TRUST

England & Wales · Charity number 1098516

Details

Status Registered

Legal form Other

Registered 2003-07-11

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

Contact

Address 133 Albert Street
London
NW1 7NB

Phone 020 7485 4737

Website eloiseandkatie.com

Activities

Objects: (1) THE RELIEF OF SICKNESS, IN PARTICULAR, BUT NOT EXCLUSIVELY, THE TREATMENT AND PREVENTION OF CANCER AND PARKINSON'S DISEASE BY THE PROVISION OF GRANTS.(2) THE ADVANCEMENT OF EDUCATION OF YOUNG PERSONS BY THE PROVISION OF GRANTS AND SCHOLARSHIPS IN PARTICULAR BUT NOT EXCLUSIVELY IN THE SCIENCES

Activities: The Trust was set up in 2003 in memory of Eloise and Katie Plunkett - two young sisters who both died of cancer. It (a) funds small projects in England and Scotland that make a real difference to the lives of young people and (b) supports causes which are important to the Plunkett family - particularly cancer and Parkinson's Disease.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations
- **What:** General Charitable Purposes, Education/training, The Advancement Of Health Or Saving Of Lives, Disability, Amateur Sport, Recreation
- **Who:** Children/young People, People With Disabilities, Other Charities Or Voluntary Bodies

Geography

- Scotland

Finances

Period end	Income	Expenditure	Assets	Employees
2025-04-30	£32,453	£67,085	-	-
2024-04-30	£37,035	£29,697	-	-
2023-04-30	£70,814	£27,382	-	-
2022-04-30	£70,933	£13,408	-	-
2021-04-30	£6,856	£18,162	-	-

Trustees

Name	Role	Appointed
ALEXANDRA JANE SEARS		2003-06-20
ALICE FOX-PITT		2003-06-20
CAROLINE HARRIET VILLIERS		2003-06-20
CELIA MARY PLUNKETT		2003-06-20
Iona Caroline Hoare		2023-11-13
JANE ELISABETH SYBIL ROBERTS		2013-04-23
Katherine Anne Warren		2023-11-13
LAURA CLARE EDDELL		2003-06-20
ROWENA CECILIA WITCHELL		2003-06-20

THE ELOISE AND KATIE MEMORIAL TRUST

England & Wales - Charity number 1098516

Accounts

THE ELOISE and KATIE MEMORIAL TRUST

TRUSTEES' ANNUAL REPORT for year ending 30 April 2025

The Trustees continue to focus on learning support programmes and activities for disadvantaged children/teenagers whose education/wellbeing was disrupted by school closures during the pandemic and, more recently, by cutbacks in local authority spending.

Donations are made to charitable and other organisations in England and Scotland with the emphasis on relatively small projects that make a difference. Bursaries are also provided to individuals.

Applicants are required to provide detailed submissions and the Trustees carry out appropriate due diligence as part of their decision-making process.

Income in 2024/25

£32,453 [2022/23: £37,03]

The Memorial Trust's second Golf Day in June 2024 attracted 17 teams and raised £14,247 after expenses. The Trustees are very grateful to Rushmore Golf Club for hosting the event and agreeing to do so again in June 2025.

The "Mini Olympics" in July 2024 raised £2,445 with families taking part in a range of sporting activities at Cradle Farm. It is hoped to repeat the event in 2026.

The Memorial Trust also received a generous donation from "Tartan Fling" - a Scottish reeling party for teenagers held in Shipston-on-Stour in April 2024.

Donations in 2024/25

£63,090 [2022/23: £23,358]

The largest were £7,500 to Mulberry Bush School in Oxfordshire, £7,000 to Teenage Cancer Trust to fund a new information booklet and £7,000 to Ashton Special Needs Secondary School in Glasgow to enable it to purchase a new minibus.

The £3,000 donated to Women's Community Matters enabled vulnerable teenagers to take part in additional activities at WCM's 2025 summer camp.

The ten new recipients included the Refreshing Minds "Oasis" programme in Hackney, Coram Beanstalk's primary school literacy programme and Longborough Festival Opera's education outreach programme.

Three bursaries totalling £4,790 [2022/23: £5,378] were provided for music, drama and riding tuition.

The majority of funding applications are now be made via the eloiseandkatie.com website. The significant increase in the number received is reflected in the range of projects supported in 2024/25. However, the

use of AI means submissions are not always relevant to the Memorial Trust which suggests applicants are adopting a “scatter gun” approach and ignoring a charity’s aims and objectives.

Jane Roberts
Treasurer
December 2025

THE ELOISE and KATIE MEMORIAL TRUST

Registered Charity 1098516

1 May 2024 to 30 April 2025

	2024/25	2023/24
Opening balance at bank 1 May 2024	£155,296.55	£147,958.67
Income including Gift Aid reclaims [Note 1]	27,349.63	32,270.85
Bank interest	5,103.37	4,764.41
Donations made [Note 2]	[63,090.00]	[23,358.00]
Other expenditure [Note 3]	[3,994.76]	[6,339.38]
Closing balance at bank 30 April 2025 *	£120,664.79	£155,296.55

- £10,667.79 on current account and £110,000 on 35 day notice

NOTE 1 - INCOME

May 2024

Via Just Giving	95.00
Donation - George Baker	125.00
Donation - Tartan Fling event	3,674.41
Bluebell Walk, Great Tew - April 2024	695.00
6 x Charity Golf Day entries - June 2024	5,988.00
2 x Cradle Olympics entries - July 2024	200.00

June 2024

Via Just Giving	192.90
1 x Charity Golf Day entries - June 2024	1,262.00
3 x Cradle Olympics entries - July 2024	300.00

July 2024

Via Just Giving	95.00
10 x Cradle Olympics entries - July 2024	1,200.00
Cradle Olympics - sale of Pimms	345.00

August 2024

Via Just Giving	95.00
Donation - Radnor Charitable Trust	250.00

September 2024

Via Just Giving	95.00
Donation - Meyer Charitable Trust	200.00

October 2024

Via Just Giving	95.00
Donation - Rosemary Macaire	2,000.00
Donation - Mrs C J McBean	277.56

November 2024

Via Just Giving	95.00
Donation - Sumner Wilson Charitable Trust	2,500.00

December 2024	
Via Just Giving	95.00
Via Just Giving - Mrs H C Tylor	4,904.70 *
January 2025	
Via Just Giving	95.00
February 2025	
Via Just Giving	118.75
March 2025	
Via Just Giving	167.50
Via Just Giving - Gift Aid reclaims	2,040.93 **
April 2025	
Via Just Giving	147.88
Total	£27,349.63

* £5,000 less 1.9% Just Giving donation processing fee
** Includes £1,187.50 on £5,000 donation less 5% Just Giving fee

NOTE 2 – DONATIONS MADE

June 2024	
Music tuition bursary	760.00
Heros	2,500.00
Branch Trust, Chipping Norton	2,500.00
Unicorn Equestrian Centre	2,000.00
Campden Edge Youth Art Fund	1,000.00
August 2024	
Heythrop Pony Club bursary	280.00
September 2024	
Future Frontiers	3,000.00
Drama bursary [1 st of 3 terms]	1,500.00
December 2024	
Mulberry Bush School	7,500.00
Teenage Cancer Trust	7,000.00
Ashton Special Needs Secondary School, Glasgow	7,000.00
Refreshing Minds - Oasis programme	5,000.00
Coram Beanstalk - Primary schools literacy programme	5,000.00
Longborough Festival Opera - Education programme	5,000.00
Jon Egging Trust	3,500.00
Drama bursary [2 nd of 3 terms]	1,125.00
February 2025	
Kids Inspire	2,300.00

March 2025

Women's Community Matters - 2025 summer camp	3,000.00
RAW Workshop, High Wycombe	2,000.00

April 2025

Drama bursary (3 rd of 3 terms)	1,125.00
--	----------

Total	£63,090.00
--------------	-------------------

NOTE 3 - OTHER EXPENDITURE

Bank charges	382.00
Charity Golf Day costs - June 2024	3,052.96
Leap Creative - website hosting/updating 2025	559.80

Total	£3,994.76
--------------	------------------



Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name
ELOISE AND KATIE MEMORIAL TRUST

On accounts for the year ended

30 APRIL 2025

Charity no (if any)

1098516

Set out on pages

TWO

(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 30/04/2024

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 (~~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.G. Mitchenall

Date:

4th February 2026

Name:

Robert Mitchenall

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

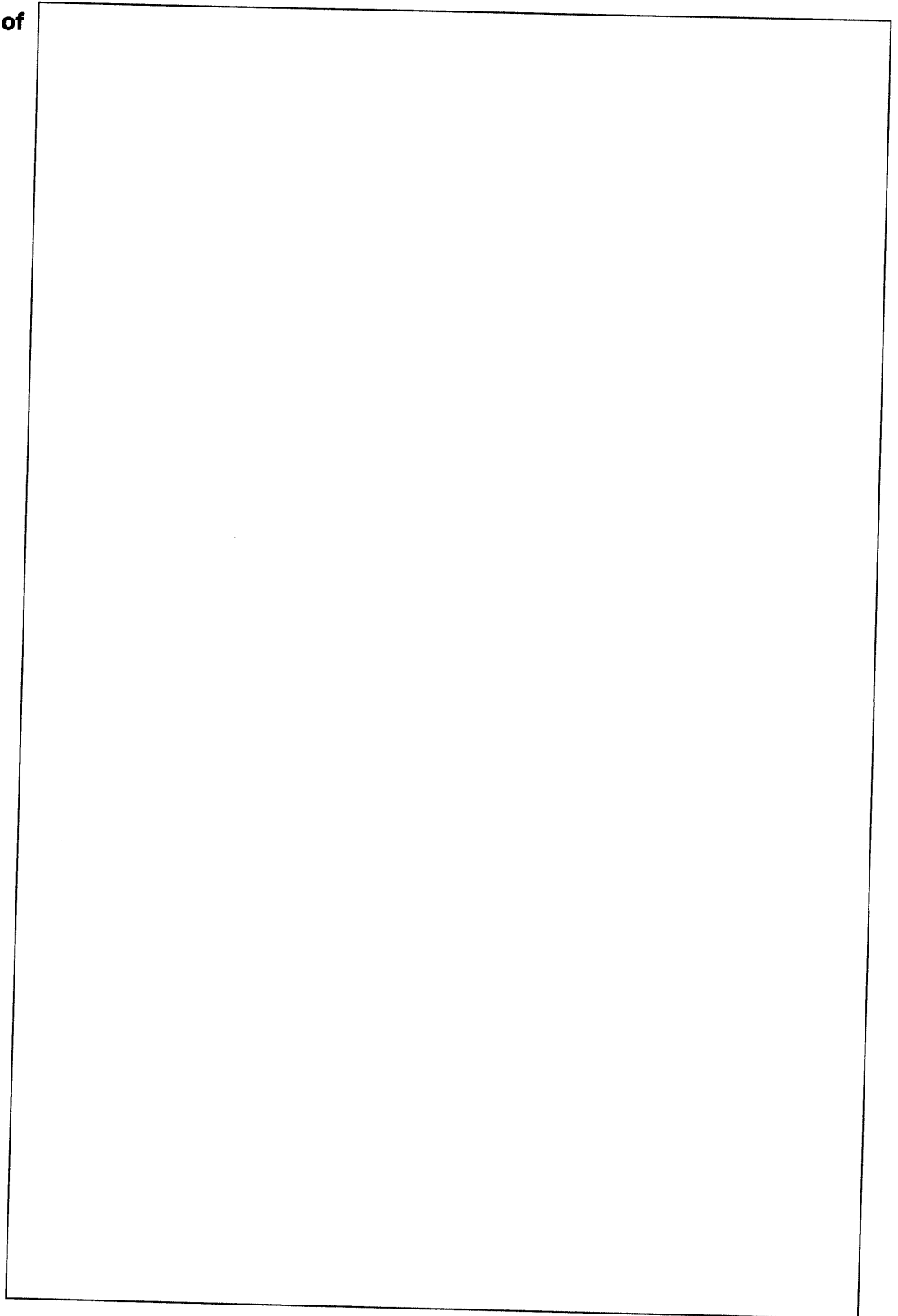
C.Eng, FIET, MIE

Address:

Dashwood, Wootton Rivers, Marlborough, SN8 4NQ

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.



THE ELOISE AND KATIE MEMORIAL TRUST

England & Wales - Charity number 1098516

Accounts

THE ELOISE and KATIE MEMORIAL TRUST

TRUSTEES' ANNUAL REPORT for year ending 30 April 2024

Two additional Trustees - Katherine Warren and Iona Hoare - were appointed in November 2023.

The Trustees continue to focus on learning support programmes and activities for disadvantaged children and teenagers whose education/wellbeing was disrupted by school closures during the pandemic and, more recently, by cutbacks in local authority spending.

Donations are made to charitable and other organisations in England and Scotland with the emphasis on relatively small projects that make a difference. Bursaries are also provided to individuals.

Applicants are required to provide detailed submissions and the Trustees carry out appropriate due diligence as part of their decision-making process.

Income in 2023/24

This was £37,035 [2022/23: £65,586] and included advance entry payments for the June 2024 Golf Day [£10,050] and July 2024 "Mini Olympics" at Cradle Farm [£400].

The June 2023 Golf Day attracted 18 teams and raised £14,551 after expenses. The Trustees are very grateful to Rushmore Golf Club for hosting the event and agreeing to do so again in June 2024. They are also very grateful to the three artists who exhibited at Hinton in December 2023 and generously donated £7,472 from their sales. Other fundraising included a walk on the Ridgeway in May 2023 and an event at Carlisle Races in April 2024.

Donations in 2023/24

The total was £23,358 [2022/23: £25,762]. The largest were £7,000 to Home Start, £5,000 to Mulberry Bush School in Oxfordshire for new iPads and £3,000 to Women's Community Matters in Barrow-on-Furness to enable vulnerable teenagers to take part in additional activities at WCM's 2024 summer camp in the Lake District. The Memorial Trust first supported Mulberry Bush in 2015/16 and WCM in 2022/23.

Bursaries of £5,358 [2022/23: £4,257] were also provided for music, drama and riding tuition.

Other expenditure in 2023/24

This was £6,339 [2022/23: £1,620]. £2,959 was paid to Rushmore Golf Club for the June 2023 Golf Day and £3,031 for the new website - eloiseandkatie.com - which went "live" in February 2024 and is helping raise awareness of the Memorial Trust among donors and the charitable sector.

As funding submissions can now be made via the website, there has been a significant increase in both the number and variety of applications

received. This is reflected in the range of projects the Trustees are supporting in 2024/25.

Jane Roberts
Treasurer
December 2024

THE ELOISE and KATIE MEMORIAL TRUST

Registered Charity 1098516

Accounts

1 May 2023 to 30 April 2024

2022/23

2023/24

Opening balance at bank 1 May 2023	
£147,958.67	£104,527.21
Income [Note 1]	
32,270.85	64,235.65
Refund of 2019 QUEST donation	
-	5,227.28
Bank interest	4,764.41
1,350.68	
Donations made [Note 2]	[23,358.00]
[25,761.98]	
Other expenditure [Note 3]	
[6,339.38]	[1,620.17]
Closing balance at bank 30 April 2024	
£155,296.55	£147,958.67

- £25,000 was added to the 35 day notice account on 14 June 2023
- Closing balance: £30,296.55 on current account + £125,000 on 35 day notice

NOTE 1 - INCOME

May 2023

Via Just Giving

658.07

6 x Charity Golf Day entries - June 2023

6,250.00

CAF donation Ridgeway Walk - May 2023

300.00

June 2023

Via Just Giving

119.32

3 x Charity Golf Day entries - June 2023

2,500.00

July 2023

Via Just Giving

95.00

August 2023

Via Just Giving

95.00

September 2023

Via Just Giving
95.00

October 2023

Via Just Giving
95.00
Donation - Rosemary Macaire
2,000.00

November 2023

Via Just Giving
95.00

December 2023

Via Just Giving
95.00
Donation - Amelia Hemmings [Hinton exhibition - Dec 2023]
1,542.00

January 2024

Via Just Giving
585.30
Donation - George Irvine [Hinton exhibition]
3,010.00
Donation - Arabella Brooke [Hinton exhibition]
2,920.00

February 2024

Via Just Giving
95.00

March 2024

Via Just Giving
95.00
1 x Charity Golf Day entry - June 2024
1,000.00

April 2024

Via Just Giving
596.54 *
Carlisle Race Day cash donations - April 2023
579.62
9 x Charity Golf Day entries - June 2024
9,050.00
4 x Cradle Olympics entries - July 2024
400.00

Total	£32,270.85
--------------	-------------------

* Includes £400 from Carlisle Race Day

NOTE 2 - DONATIONS MADE

May 2023

Music tuition [Heidi Wiseman]
332.50

June 2023

Music tuition [Heidi Wiseman]
1,235.00

September 2023

Drama tuition [Westminster School of Performing Arts]
90.00
Heythrop Pony Club bursary
300.00

October 2023

Mulberry Bush School, Witney
5,000.00

November 2023

Home Start - Banbury, Bicester & Chipping Norton
7,000.00
Music tuition [Heidi Wiseman]
1,520.00
Sturminster & Hinton Cricket Club
1,000.00
Heythrop Pony Club bursary
90.00

December 2023

The Vale Pantry, Sturminster Newton
2,000.00
Heythrop Pony Club bursary (Newman-Moore family)
1,000.00

January 2024

Music tuition [Heidi Wiseman]
610.50

April 2024

Women's Community Matters, Barrow-on-Furness
3,000.00
Drama tuition [Westminster School of Performing Arts]
180.00

Total	£23,358.00
--------------	-------------------

NOTE 3 - OTHER EXPENDITURE

Charity Golf Day - June 2023
2,948.54
Leap Creative - website design and hosting
3,030.84

Monthly bank charges [12 x £30]
360.00

Total

£6,339.38



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 ELOISE AND KATIE MEMORIAL TRUST

On accounts for the year ended 30 APRIL 2024 Charity no (if any) 1098516

Set out on pages ONE

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30/04/2024

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.

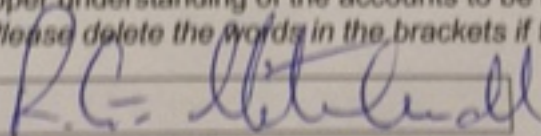
Independent
examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention (~~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 proper understanding of the accounts to be reached.

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

Signed:  Date: 28 October 2024

Name: Robert Mitchenall

Relevant professional
qualification(s) or body
(if any): C.Eng, FIET, MIE

Address: Dashwood, Woolton Rivers, Marlborough, SN8 4NQ

THE ELOISE AND KATIE MEMORIAL TRUST

England & Wales - Charity number 1098516

Accounts

THE ELOISE and KATIE MEMORIAL TRUST
--

TRUSTEES' ANNUAL REPORT for year ending 30 April 2023

When the Trustees met in 2020, the pandemic was expected to have a significant impact on the charitable sector in terms of increased demand - particularly to support vulnerable families - combined with a fall in income from fundraising.

The Trustees therefore agreed that donations should focus primarily on learning support programmes/activities for disadvantaged young people whose education was being disrupted by school closures. The emphasis would continue to be on relatively small projects in England and Scotland able to demonstrate their ability to make a difference.

Income

Thanks to the generosity of Eloise and Katie Plunkett's cousins, the Memorial Trust received four further family donations totaling £42,866 in 2022/23. This meant income [including bank interest] was £65,586 compared to an average of £7,227 per annum for the five years to 2020/21.

In addition, a refund of £5,227 was received from the Institution of Civil Engineers. This followed the Trustees' decision to close the annual Eloise Plunkett Award administered by ICE and funded by the Memorial Trust after making a final £3,000 Award in February 2023. The Trustees are now looking at other ways of encouraging careers in civil engineering in Eloise's memory - possibly by focusing on 6th form and/or university students.

2022/23 income also included £9,000 of advance entry payments for a Charity Day held at Rushmore Golf Club in June 2023 and £3,766 from ticket sales for a concert by Hal Cazalet in December 2022. The concert and dinner was the Memorial Trust's first post-Covid event and raised £2,505 to support the Friends of Stour Connect - a community day centre run by Care Dorset for the elderly and adults with physical and learning disabilities.

Donations

£25,762 was donated in 2022/23. The largest was £7,500 to Mulberry Bush School in Oxfordshire - which the Memorial Trust has supported since 2015 - to upgrade its residential facilities.

£4,000 was donated to the Friends of Ashton School in Craigend, Glasgow - an inner city state secondary school providing Additional Learning Support - to help equip an on site café giving pupils key skills to boost their employment prospects. The café has been a great success and the Trustees hope to support its future expansion.

Other new projects included donations to the John Egging Trust [£3,500] and Women's Community Matters in Barrow-on-Furness [£3,000]. The latter funded additional activities for vulnerable teenagers at WCM's annual summer camp in the Lake District. The feedback was very positive and the Trustees hope to support this again in 2023/24.

Further information on these projects can be found on eloiseandkatie.com

Trustees

At the November 2022 annual meeting, it was agreed to invite Katherine Warren and Iona Hoare to become trustees. Both accepted and formally took up their appointments in November 2023.

Jane Roberts

Treasurer

December 2023

THE ELOISE and KATIE MEMORIAL TRUST
Annual accounts
1 May 2022 to 30 April 2023

	2022/23	2021/22
Opening balance at bank 1 May 2022	£104,527.21	£47,002.20
Income [Note 1]	64,235.65	70,925.00
Refund of 2019 QUEST donation [Note 1]	5,227.28	-
Bank interest	1,350.68	8.01
Donations made [Note 2]	[25,761.98]	[13,148.00]
Other expenditure [Note 3]	[1,620.17]	[260.00]
Closing balance at bank 30 April 2023	£147,958.67	£104,527.21

- £25,000 was added to the 35 day notice account on 22 Sept 2022
- Closing balance = £47,958.67 on current account + £100,000 on 35 day notice

NOTE 1 - INCOME

May 2022

Via Just Giving 118.75

June 2022

Via Just Giving 155.10

July 2022

Via Just Giving 118.75

August 2022

Via Just Giving 118.75
 Catkin Taylor 10,000.00
 Julie Fellows 7,433.00
 S & F Vickers 7,000.00
 David Macaire 18,433.00

September 2022

Via Just Giving 118.75
 Viv Ansell 200.00

October 2022

Via Just Giving 118.75
 Rosemary Macaire 2,000.00

November 2022

Via Just Giving 118.75

December 2022

Via Just Giving 118.75

January 2023	
Via Just Giving	118.75
February 2023	
Via Just Giving	155.10
Heber-Percy Charitable Trust	5,000.00
March 2023	
Eventbrite ticket sales for Hal Cazalet fundraising concert In aid of Friends of Stour Connect	3,765.60
2 x Charity Golf Day entries	2,000.00
April 2023	
Via Just Giving	143.85
7 x Charity Golf Day entries	7,000.00
	£64,235.65
Plus: Refunded balance of July 2019 donation for Institution of Civil Engineers QUEST award	5,227.28

Total	£69,462.93
--------------	-------------------

NOTE 2 - DONATIONS MADE

June 2022	
Friends of Ashton School, Glasgow	4,000.00
Music tuition [Heidi Wiseman]	1,082.20
July 2022	
Drama tuition/LAMDA exam [Westminster School of Performing Arts]	233.50
Pony Club training bursary	200.00
October 2022	
Mulberry Bush School	7,500.00
Music tuition	1,516.35
Drama tuition [WSPA]	90.00
January 2023	
Music tuition	1,044.50
Macmillan Cancer Support Scotland	1,000.00
February 2023	
John Egging Trust	3,500.00
Women's Community Matters	3,000.00
March 2023	
Friends of Stour Connect [Net proceeds of Hal Cazalet fundraising concert]	2,505.43

April 2023

Drama tuition [WSPA]

90.00

Total	£25,761.98
--------------	-------------------

NOTE 3 - OTHER EXPENDITURE

Hal Cazalet fundraising concert

1,260.17

Bank charges

360.00

Total	£1,620.17
--------------	------------------



Section A Independent Examiner's Report

Report to the trustees/
members of

ELOISE AND KATIE MEMORIAL TRUST

On accounts for the year
ended

30 APRIL 2023

Charity no
(if any)

1098516

Set out on pages

ONE

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30/04/2023.

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 (~~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:

Date:

28/10/2023

Name:

Robert Mitchenall

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

C.Eng, FIET, MIE

Address:

Dashwood, Wootton Rivers, Marlborough, SN8 4NQ

THE ELOISE AND KATIE MEMORIAL TRUST

England & Wales - Charity number 1098516

Accounts

ELOISE and KATIE MEMORIAL TRUST

TRUSTEES ANNUAL REPORT for year ending 30 April 2022

The pandemic inevitably continued to restrict activity and the Trustees were unable to hold a formal meeting during the 2021/22 financial year. Although the 2020 meeting had agreed there would be a fundraising event in February 2022 to mark the 25th anniversary of Katie Plunkett's death, it was not possible to arrange this.

However, thanks to the generosity of Eloise and Katie's cousins and a family charity, the Trust unexpectedly received four donations totaling £67,000 in 2021/22. This meant total income was £70,925 compared to an average of £7,227 per annum over the previous five years.

When the Trustees met in 2020, it was anticipated that COVID would have a significant impact on the charitable sector in terms of increased demand for funding - particularly to support families - combined with less income from fundraising. Even charities reliant on investment income would be affected as companies reduced, or cut, dividend payments.

Against this backdrop, the Trustees agreed to focus donations on learning support programmes/activities for disadvantaged young people whose education was being disrupted by school closures. The emphasis would continue to be on relatively small projects in England and Scotland that were able to demonstrate they could make a difference to their lives.

The Memorial Trust therefore made further donations in 2021/22 to:

- Mulberry Bush School in Oxfordshire which helps rebuild the lives of those with challenging family backgrounds who have been excluded from school. The Trust has supported the school since 2015 and this donation was for projects to improve residential facilities
- Ebony Horse Club in Brixton, south London, which works with local schools to support pupils with physical, mental or behavioural problems by helping them learn new skills outside their home/classroom environment. I visited the Club in November 2021 and was impressed to see first-hand how much can be achieved by a small organization with a modest budget and limited facilities

Since October 2021, the Memorial Trust has also funded music and drama tuition for a number of refugees in west London.

As at 30 April 2022, the Trustees had agreed to support the Friends of Ashton Secondary School in Glasgow - an inner city state special school providing Additional Learning Support [ALS] alongside mainstream secondary education. The donation - to equip an on site café/shop giving pupils key skills to help boost their employment prospects - will be covered in the 2022/23 accounts and TAR.

The Eloise Plunkett Award, which is funded by the Memorial Trust and administered by the Institution of Civil Engineers [ICE], was suspended in 2021/22 because of restrictions on overseas travel. It will re-open shortly and the Trustees have increased the 2022/23 Award to mark the 20th anniversary of Eloise's death in July 2002.

Jane Roberts

Treasurer
December 2022



•

•

•

•

•

•



ELOISE AND KATIE MEMORIAL TRUST
Accounts
1 May 2021 to 30 April 2022

Opening balance at bank 1 May 2021

£47,002.20

Donations received [Note 1]

70,925.00

Bank interest

8.01

Donations made [Note 2]

[13,148.00]

Other expenditure [Note 3]

[260.00]

Closing balance at bank 30 April 2022

£104,527.21

- *The Santander account was closed on 8 July 2021 when the balance of £47,217.49 was transferred to the Trustees' new account at C. Hoare & Co*
- *£75,000 was transferred to a 35 day notice account on 10 March 2022. As at 30 April, the balance of £29,527.21 was held on current account*

NOTE 1 - Donations received

Just Giving donations were temporarily suspended from July to October while the new bank account details were registered

May 2021

Via Just Giving 118.75

June 2021

Via Just Giving 95.00

July 2021

Juliet Fellows 11,000.00

August 2021

Fiona Vickers 11,000.00

October 2021

Via Just Giving 498.75

Rosemary Macaire 2,000.00

November 2021

Via Just Giving 118.75

Ansell Family Charity	25,000.00
Susanna Bustamente	20,000.00

December 2021

Via Just Giving	118.75
Sir John Aird Charity	500.00

January 2022

Via Just Giving	118.75
-----------------	--------

February 2022

Via Just Giving	118.75
-----------------	--------

March 2022

Via Just Giving	118.75
-----------------	--------

April 2022

Via Just Giving	118.75
-----------------	--------

TOTAL DONATIONS RECEIVED £70,925.00
--

NOTE 2 - Donations made

October 2021

Music tuition [Heidi Wiseman]	710.00
Drama tuition [Westminster School of Performing Arts]	80.00

December 2021

Mulberry Bush	School	
6,000.00		
Music tuition		400.00

January 2022

Music tuition	958.00
---------------	--------

February 2022

Ebony Horse Club	5,000.00
------------------	----------

TOTAL DONATIONS MADE	£13,148.00
-----------------------------	-------------------

Note 3 - Other expenditure

Monthly bank charges [Sept - April]	260.00
-------------------------------------	--------

TOTAL

£260.00



Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name ELOISE and KATIE MEMORIAL TRUST

On accounts for the year ended

30 APRIL 2022

Charity no (if any)

1098516

Set out on pages

Examined (signed) 10th Feb 2023

(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 DD / MM / YYYY.

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 (~~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:

[Signature]

Date:

10th Feb 2023

Name:

GARETH RAYMOND BULBIN

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

BSc (Eng) 2nd class / AMI MechE retired

Address:

KENNET COTTAGE
WOOTTON RIVERS
WALLBOUGH SNR HNR

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.

[Handwritten notes in a large rectangular box, including several lines of text and a signature.]

ELOISE AND KATIE MEMORIAL TRUST
Accounts
1 May 2021 to 30 April 2022

Opening balance at bank 1 May 2021	£47,002.20
Donations received [Note 1]	70,925.00
Bank interest	8.01
Donations made [Note 2]	[13,148.00]
Other expenditure [Note 3]	[260.00]
Closing balance at bank 30 April 2022	£104,527.21

- *The Santander account was closed on 8 July 2021 when the balance of £47,217.49 was transferred to the Trustees' new account at C. Hoare & Co*
- *£75,000 was transferred to a 35 day notice account on 10 March 2022. As at 30 April, the balance of £29,527.21 was held on current account*

NOTE 1 - Donations received

Just Giving donations were temporarily suspended from July to October while the new bank account details were registered

May 2021

Via Just Giving ✓ 118.75 ✓

June 2021

Via Just Giving 95.00 ✓

July 2021

Juliet Fellows 11,000.00 ✓

August 2021

Fiona Vickers 11,000.00 ✓

October 2021

Via Just Giving 498.75 ✓

Rosemary Macaire 2,000.00 ✓

November 2021

Via Just Giving 118.75 ✓

Ansell Family Charity 25,000.00 ✓

Susanna Bustamente 20,000.00 ✓

December 2021

Via Just Giving 118.75 ✓

Sir John Aird Charity 500.00 ✓

Examined.

S.R. Bell

10th Feb 2023

January 2022
Via Just Giving 118.75 ✓

February 2022
Via Just Giving 118.75 ✓

March 2022
Via Just Giving 118.75 ✓

April 2022
Via Just Giving 118.75 ✓

TOTAL DONATIONS RECEIVED £70,925.00 ✓

NOTE 2 - Donations made

October 2021
Music tuition [Heidi Wiseman] 710.00 ✓
Drama tuition [Westminster School of Performing Arts] 80.00 ✓

December 2021
Mulberry Bush School 6,000.00
Music tuition 400.00 ✓

January 2022
Music tuition 958.00 ✓

February 2022
Ebony Horse Club 5,000.00 ✓

TOTAL DONATIONS MADE £13,148.00 ✓

Note 3 - Other expenditure

Monthly bank charges [Sept - April] 260.00 ✓

TOTAL £260.00 ✓

Examined
S. R. Belkin
10th February 2023