

# THE UNIVERSITY OF THE THIRD AGE - HAXBY AND WIGGINTON

England & Wales · Charity number 1118861

## Details

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**Status** Registered

**Legal form** Other

**Registered** 2007-04-18

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

## Contact

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**Address** 8 Angram Close  
York  
YO30 5ZN

**Phone** 01904479665

**Email** [Treasurer@hawu3a.org](mailto:Treasurer@hawu3a.org)

**Website** [www.hawu3a.org](http://www.hawu3a.org)

## Activities

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**Objects:** THE ADVANCEMENT OF EDUCATION AND, IN PARTICULAR, THE EDUCATION OF OLDER PEOPLE AND THOSE WHO ARE RETIRED FROM FULL TIME WORK, BY ALL MEANS INCLUDING ASSOCIATED ACTIVITIES CONDUCIVE TO LEARNING AND PERSONAL DEVELOPMENT.

**Activities:** Provide Learning and Social Activities for retired and semi-retired members of mainly Haxby and Wigginton area.

## Classification

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- **How:** Provides Human Resources, Acts As An Umbrella Or Resource Body
- **What:** Education/training, Arts/culture/heritage/science, Amateur Sport, Economic/community Development/employment, Recreation
- **Who:** Elderly/old People

## Geography

- **Area of benefit:** HAXBY & WIGGINGTON AND THE SURROUNDING LOCALITY
- North Yorkshire

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-08-31	£39,120	£36,489	-	-
2024-08-31	£44,380	£41,653	-	-
2023-08-31	£29,979	£28,889	-	-
2022-08-31	£19,125	£18,484	-	-
2021-08-31	£8,655	£7,327	-	-

## Trustees

Name	Role	Appointed
<b>CHRISTOPHER NORMAN JAQUES</b>	Chair	2023-10-20
ANNE HYSTED		2022-10-21
Elizabeth Mary Hasnip		2025-01-20
Gordon Rex Moore		2026-04-20
Ian Evans		2026-03-16
Nick David		2024-10-18
Peter Hamilton Murray		2020-11-20
Sue Eley		2025-11-21
Trevor Bardy		2025-01-20

**THE UNIVERSITY OF THE THIRD AGE - HAXBY AND WIGGINTON**

England & Wales - Charity number 1118861

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# Accounts

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## **AGM – 21<sup>st</sup> November 2025 – Treasurer’s Report**

Our main source of income is from members’ subscriptions, which is £6,151. However, offsetting this are resulting payments to the Third Age Trust; an affiliation fee of £2,208 covering advice and support, plus the cost of the magazine (TAM) of £1,072, along with support for Beacon (the Membership database) of £577 plus the siteworks of £50 (the U3A website).

As a Charity, we are able to claim Gift Aid refunds from HMRC based on subscriptions from members who have signed a Gift Aid form, which is a useful boost to our funds. This costs nothing to the members and the Treasurer does all the reclaiming work. If you pay income tax, then as a member of the H&W u3a you are eligible to allow us to reclaim tax on your behalf for the benefit for the group. A limited amount of personal information is required, and if you qualify and have not already done so, please contact the Membership Secretary who will provide you with a form, which is quite simple to complete.

We continue to make every effort to keep expenses as low as possible although we are faced with rising costs generally. We try to maintain written contact with our members during the year and have produced the news and events sheets. The use of electronic communications, when possible, keeps costs down. This is boosted by members reading the news sheet electronically rather than a hard copy.

Some Groups hire facilities to hold their meetings, which are paid directly by the group members. The Group Leaders are required to keep their own records of income and expenses, and my thanks to them for doing so. The results are included in these accounts in summary.

Overall, we have a surplus of £2,631 which increases our reserves to £19,563, and so I propose leaving the annual subscription at £10 – for the 15th year. We still have payments due to the Third Age Trust to cover including the affiliation fee. Members still receive 5 magazines per year. The committee agreed to keep a reserve fund of £10,000 to cover two years of expenses.

My thanks to Michael Robinson who has undertaken the role of Examiner and has agreed to do so next year. I propose that he is re-appointed.

Peter Murray – Treasurer – 08/10/2025

**INCOME AND EXPENDITURE**  
**01.09.2024- 31.08.2025**

<b>Expenditure</b>	<b>2024</b>	<b>2025</b>	<b>Income</b>	<b>2024</b>	<b>2025</b>
U3A Affiliation Fees	2,140.00	2,208.00	Membership Fees	6,008.00	6,151.00
U3A Magazine direct	1,283.60	1,071.64	Tax Reclaimed	1,336.60	1,371.39
U3A Beacon	560.00	577.00			
U3A Siteworks	0.00	50.00			
Paypal charges	6.68	68.30			
AGM	101.00	46.00	Grants, Commission & Donations	37.00	78.65
Hire and Set Up of Halls/Rooms	891.50	549.50	Meetings	1,667.00	1,652.00
Speakers Fees/Donations	754.00	828.00			
Refreshments	415.37	20.85			
Christmas Party	543.42	660.70	Christmas Party	588.65	513.00
Sundry Equipment	286.83	712.67			
Stationery	57.06	50.32			
Postage	154.05	137.25			
Printing/Copying	533.57	450.25			
Travel	0.00	60.35			
Mobile Phone Contract	40.00	45.00	Bank Interest	180.70	232.24
U3A Diaries	43.98	0.00	U3A Diaries	27.00	0.00
Groups	14,742.09	16,519.31	Groups	15,626.39	16,920.73
Outings	14,287.25	11,555.50	Outings	14,287.25	11,555.50
Lunches/Dinners	3,201.00	185.00	Lunches/Dinners	3,201.00	185.00
Theatre	1,395.00	460.00	Theatre	1,395.00	460.00
Sundries	216.62	233.20	Sundries	25.00	0.00
<b>Total Expenditure</b>	<b>41,653.02</b>	<b>36,488.84</b>	<b>Total Income</b>	<b>44,379.59</b>	<b>39,119.51</b>
<b>Surplus(+)</b>	<b>2,726.57</b>	<b>2,630.67</b>	<b>Deficit(-)</b>	<b>0.00</b>	<b>0.00</b>
	<b>44,379.59</b>	<b>39,119.51</b>		<b>44,379.59</b>	<b>39,119.51</b>

*P. Murray*  
Peter Murray  
Treasurer

*MK Robinson*  
MK Robinson  
Examiner

	2024		2025	
	£	£	£	£
<b>Fixed Assets at Net Book Value</b>				
	0		0	
<b>Total Fixed Assets</b>		0.00		0.00
<b>Current Assets</b>				
Barclays Current A/C	541.55		718.91	
Barclays Deposit A/C	15,008.35		17,740.59	
Paypal	0.00		0.00	
Cash	56.70		22.40	
Funds held by Groups	1,757.97		2,107.91	
Stock - stamps	518.50		381.25	
Debtors	19.32		0.00	
	<u>17,902.39</u>		<u>20,971.06</u>	
<i>Less</i>				
<b>Current Liabilities</b>				
Subs & Payments rec'd in advance	0.00		0.00	
Creditors & uncleared cheques	70.00		0.00	
Deposits paid in advance	900.00		1,408.00	
	<u>970.00</u>		<u>1,408.00</u>	
<b>Net Current Assets</b>		<b>16,932.39</b>		<b>19,563.06</b>
		<u><b>16,932.39</b></u>		<u><b>19,563.06</b></u>
Reserves - cash balance excl funds relating to groups.		13,914.56		16,143.81
<b>Represented by</b>				
<b>Members' Fund</b>				
Accumulated Balance Brought Forward	14,205.82		16,932.39	
Add Surplus for the year	<u>2,726.57</u>	<b>16,932.39</b>	<u>2,630.67</u>	<b>19,563.06</b>
<b>Total Members Fund</b>		<u><b>16,932.39</b></u>		<u><b>19,563.06</b></u>

*P. Murray*

Peter Murray  
Treasurer

*MK Robinson*

MK Robinson  
Examiner

57 Lucombe Way  
New Earswick  
York  
YO32 4DS

20 October 2025

To whom it may concern

I have examined the accounts and necessary financial documents of Haxby and Wigginton U3A for the year ended 31 August 2025 and found them to be an accurate and true record.

Yours faithfully

M K Robinson  
Examiner of Accounts

**THE UNIVERSITY OF THE THIRD AGE - HAXBY AND WIGGINTON**

England & Wales - Charity number 1118861

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# Accounts

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## **AGM – 18<sup>th</sup> October 2024 – Treasurer’s Report**

Our main source of income is from members’ subscriptions, which is £6,008. However, offsetting this are resulting payments to the Third Age Trust; an affiliation fee of £2,140 covering advice and support, plus the cost of the magazine (TAM) of £1,284, along with support for Beacon (the Membership database) of £560.

As a Charity, we are able to claim Gift Aid refunds from HMRC based on subscriptions from members who have signed a Gift Aid form, which is a useful boost to our funds. This costs nothing to the members and the Treasurer does all the reclaiming work. If you pay income tax, then as a member of the H&W u3a you are eligible to allow us to reclaim tax on your behalf for the benefit for the group. A limited amount of personal information is required, and if you qualify and have not already done so, please contact the Membership Secretary who will provide you with a form, which is quite simple to complete.

We continue to make every effort to keep expenses as low as possible although we are faced with rising costs generally. We try to maintain written contact with our members during the year and have produced the news and events sheets. The use of electronic communications, when possible, keeps costs down. This is boosted by members reading the news sheet electronically rather than a hard copy.

Some Groups hire facilities to hold their meetings, which are paid directly by the group members. The Group Leaders are required to keep their own records of income and expenses, and my thanks to them for doing so. The results are included in these accounts in summary.

Overall, we have a surplus of £2,727 which increases our reserves to £16,932, and so I propose leaving the annual subscription at £10 – for the 14th year. We still have payments due to the Third Age Trust to cover including the affiliation fee. Members still receive 5 magazines per year. The committee agreed to keep a reserve fund of £10,000 to cover two years of expenses.

My thanks to Michael Robinson who has undertaken the role of Examiner and has agreed to do so next year. I propose that he is re-appointed.

Peter Murray – Treasurer – 26/09/2024



	2023		2024	
	£	£	£	£
<b>Fixed Assets at Net Book Value</b>				
	0		0	
<b>Total Fixed Assets</b>		0.00		0.00
<b>Current Assets</b>				
Barclays Current A/C	403.81		541.55	
Barclays Deposit A/C	12,157.16		15,008.35	
Paypal	0.00		0.00	
Cash	59.08		56.70	
Funds held by Groups	1,614.77		1,757.97	
Stock - stamps	671.00		518.50	
Debtors	5.00		19.32	
	<u>14,910.82</u>		<u>17,902.39</u>	
<i>Less</i>				
<b>Current Liabilities</b>				
Subs & Payments rec'd in advance	0.00		0.00	
Creditors & uncleared cheques	0.00		70.00	
Deposits paid in advance	705.00		900.00	
	<u>705.00</u>		<u>970.00</u>	
<b>Net Current Assets</b>		<b>14,205.82</b>		<b>16,932.39</b>
		<u><b>14,205.82</b></u>		<u><b>16,932.39</b></u>
Reserves - cash balance excl funds relating to groups.		12,072.29		13,914.56
<b>Represented by</b>				
<b>Members' Fund</b>				
Accumulated Balance Brought Forward	13,115.88		14,205.82	
Add Surplus for the year	1,089.94	<b>14,205.82</b>	2,726.57	<b>16,932.39</b>
		<u><b>14,205.82</b></u>		<u><b>16,932.39</b></u>
<b>Total Members Fund</b>		<b>14,205.82</b>		<b>16,932.39</b>

Peter Murray  
Treasurer

*P. Murray*

MK Robinson  
Examiner



57 Lucombe Way  
New Earswick  
York  
YO32 4DS

16 November 2024

To whom it may concern:

I have examined the accounts and necessary financial documents of Haxby & Wigginton USA for the year ended 31 August 2024 and found them to be an accurate and true record.

M K Robinson  
Examiner of Accounts

**THE UNIVERSITY OF THE THIRD AGE - HAXBY AND WIGGINTON**

England & Wales - Charity number 1118861

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# Accounts

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**INCOME AND EXPENDITURE**  
01.09.2022 - 31.08.2023

	2022	2023		2022	2023
<b>Expenditure</b>			<b>Income</b>		
U3A Affiliation Fees	1,928.00	2,046.00	Membership Fees	5,480.00	5,813.00
U3A Magazine direct	1,000.02	1,146.81	Tax Reclaimed	863.14	1,099.17
U3A Beacon	505.00	538.00			
Paypal charges	32.60	34.08			
Open Day & AGM	0.00	198.93	Grants, Commission & Donations	49.69	650.61
Hire and Set Up of Halls/Rooms	372.00	532.00	Meetings	395.00	936.21
Speakers Fees/Donations	930.00	591.00			
Refreshments	260.39	286.47			
Christmas Party	0.00	417.98	Christmas Party	0.00	486.00
Sundry Equipment	190.28	1,086.33			
Stationery	54.39	70.85			
Postage	167.13	198.30			
Printing/Copying	715.57	1,062.98			
Depreciation	0.00	0.00	Bank Interest	1.69	54.64
U3A Diaries	79.95	75.53	U3A Diaries	58.00	57.00
Groups	10,134.45	12,068.06	Groups	10,301.76	12,572.17
Outings	1,289.00	7,639.80	Outings	1,289.00	7,639.80
Lunches/Diners	452.50	300.00	Lunches/Diners	452.50	300.00
Theatre	234.00	340.00	Theatre	234.00	340.00
Sundries	139.17	253.62	Sundries	0.00	30.08
<b>Total Expenditure</b>	<b>18,494.45</b>	<b>28,889.74</b>	<b>Total Income</b>	<b>19,124.78</b>	<b>29,978.66</b>
<b>Surplus(+)</b>	<b>640.33</b>	<b>1,089.94</b>	<b>Deficit(-)</b>	<b>0.00</b>	<b>0.00</b>
	<b>19,124.78</b>	<b>29,978.68</b>		<b>19,124.78</b>	<b>29,978.68</b>

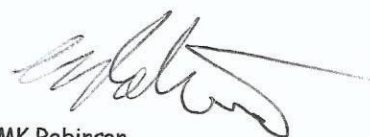
*P Murray*  
Peter Murray  
Treasurer

*M Robinson*  
MK Robinson  
Examiner

	2022		2023	
	£	£	£	£
<b>Fixed Assets at Net Book Value</b>				
	0		0	
<b>Total Fixed Assets</b>		0.00		0.00
<b>Current Assets</b>				
Barclays Current A/C	830.05		403.81	
Barclays Deposit A/C	10,502.52		12,157.16	
Paypal	0.00		0.00	
Cash	115.55		59.08	
Funds held by Groups	1,223.76		1,614.77	
Stock - stamps	854.00		671.00	
Debtors	0.00		5.00	
	<u>13,525.88</u>		<u>14,910.82</u>	
<i>Less</i>				
<b>Current Liabilities</b>				
Subs & Payments rec'd in advance	10.00		0.00	
Creditors & uncleared cheques	220.00		0.00	
Deposits paid in advance	180.00		705.00	
	<u>410.00</u>		<u>705.00</u>	
<b>Net Current Assets</b>		<b>13,115.88</b>		<b>14,205.82</b>
		<u><b>13,115.88</b></u>		<u><b>14,205.82</b></u>
Reserves - cash balance excl funds relating to groups.		11,486.46		12,072.29
<b>Represented by</b>				
<b>Members' Fund</b>				
Accumulated Balance Brought Forward	12,475.55		13,115.88	
Add Surplus for the year	640.33	<b>13,115.88</b>	1,089.94	<b>14,205.82</b>
		<u><b>13,115.88</b></u>		<u><b>14,205.82</b></u>
<b>Total Members Fund</b>		<b>13,115.88</b>		<b>14,205.82</b>

P Murray

Peter Murray  
Treasurer



MK Robinson  
Examiner