



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Trustees' Annual Report for the period

**From 17.07.24
Period end date**

Period start date To 16.07.25

Charity name: THE INDEE ROSE TRUST

Charity registration number: 1132471

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	TO PRESERVE AND PROTECT THE HEALTH OF BRAIN TUMOUR PATIENTS BY PROVIDING AND ASSISITING IN THE PROVISION OF FACILITIES, SUPPORT SERVICES AND EQUIPMENT NOT NORMALLY PROVIDED BY THE STATUTORY AUTHORITIES. TO ADVANCE THE EDUCATION OF THE PUBLIC IN CHILDHOOD CANCER, PARTICULARLY BUT NOT EXCLUSIVELY BY THE PROVISION OF WEBSITE INFORMATION AND PUBLICATION OF LITERATURE DEVOTED TO AWARENESS AND EARLY DIAGNOSIS, THE PROVISION OF FREE HOLIDAY ACCOMODATION FOR CHILD BRAIN TUMOUR PATIENTS, THEIR PARENTS AND CARERS WHO ARE SUPPORTING THEM. THE PROVISION OF FAMILY GRANTS TO HELP FAMILIES AT TIME OF TREATMENT AND BEYOND.
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	WE HAVE CONTNUED TO DISTRIBUTE OUR TREASURE BOXES TO MANY CHILDREN AFFECTED BY BRAIN OR SPINAL TUMOURS, EACH TREASURE BOX COSTS ON AVERAGECIRCA £600 AND THE ITEMS IN EACH BOX ARE INDIVIDUALLY CHOSEN BY OURSELVES TO SUIT EACH CHILDS NEEDS AND INTERESTS. WE ISSUE £500 FAMILY GRANTS TO HELP FAMILIES WITH MANY COSTS THAT CAN BE GENERATED THROUGH THESE MOST TELLING TIMES WHILST THEIR CHILDREN ARE GOING THROUGH TREATMENT, THIS MAY HELP WITH TRAVEKL COSTS, PARKING, FOOD COSTS, BABT ITEMS AND IN SOME INSTANCES TOWARDS FUNERAL COSTS. WE CONTINUE TO PROVIDE QUALITY

		<p>HOLIDAY ACCOMODATION THAT IS TOTALLY FREE TO USE TO THE FAMILIES WE HAVE HAD CONTACT WITH.</p> <p>WE PROVIDE A HOLIDAY HOUSE THAT SLEEPS 7 PEOPLE ON THE KENT COAST AND A 6 BIRTH CARAVAN IN CLACTON ON SEA.</p> <p>THESE HOLIDAY HOMES ARE IN CONSTANT USE AND ARE AVAILABLE 365 DAYS A YEAR.</p> <p>THE HOLIDAY HOMES PROVIDE MUCH NEEDED RELAXATION FOR THE WHOLE FAMILY AND IS A WELL DESERVED BREAK AFTER MONTHS OF HOSPITALISATION AND THE HOMES ARE USED BY FAMILIES AFTER BERIEVEMENT,</p> <p>WE HAVE NOW PURCHASED A 5 BEDROOM HOLIDAY AND ARE TO REFURBISH THE PROPERTY TO CREATE A WONDERFUL MODERN, BEAUTIFUL FAMILY HOLIDAY FOR THE FAMILIES TO USE FREE OF CHARGE</p> <p>THROUGH OUR FUNDRAISING AND SOCIAL MEDIA SITES WE HAVE CREATED AS MUCH AWARENESS AS POSSIBLE RELATED TO CHILD BRAIN TUMOURS AND THEIR LASTING EFFECTS.</p> <p>THROUGH ONE TO ONE COUNCILLING JANE HAS EXCEEDED IN HELPING FAMILIES TO COME TO TERMS WITH THEIR CHILDS CONDITIONS AND SADLY ORE OFTEN THAN NOT HELPING THEM DEAL WITH BERIEVEMENT ISSUES.</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	YES THEY HAVE.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<p>OUR REFERALL FORMS ARE DISTRIBUTED NATIONWIDE THROUGH THE NHS AND CLIC SARGEANT. ALSO THROUGH A REFERALL LINK ON OUR WEBSITE.</p> <p>EACH REFERALL FORM IS SIGNED OF BY THE CHILDS CONSULTANT WHO ALSO CONFIRMS THEIR CONDITION.</p> <p>EACH GRANT IS AGREED BY OUR TRUSTEES BEFORE ISSUING.</p> <p>EACH HOLIDAY IS FREE TO USE BY ANY FAMILY WE HAVE HELPED IN THE PAST</p>

		WHO HAS RECEIVED ANY OF THE ABOVE HELP FROM US.
Policy on social investment including program related investment	Para 1.38	NA
Contribution made by volunteers	Para 1.38	VOLUNTEERS HELP US WITH FUND RAISING ACTIVITIES.
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 SEEM TO BE CONSTANTLY RECEIVING REFERALL FORMS FOR OUR TREASURE BOXES THAT ARE POSTED OUT ALL ACROSS THE UK AND IRELAND. WE HAVE MAINTAINED A HIGH STANDARD OF HOLIDAY ACCOMODATION AND THEIR FACILITIES AND DECORATION ETC. WE HAVE MAINTAINED A GOOD LEVEL OF LOCAL AND UK COVERAGE OF BRAIN TUMOUR AWARENESS. WE HAVE NOW PURCHASED A 5 BEDROOM HOLIDAY HOME TO CREATE A WONDERFUL MODERN HOLIDAY / SHORT TERM RESPITE HOME FOR THE FAMILILIES AND THEIR CHILDREN

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	NA
Performance of fundraising activities against objectives set	Para 1.41	WE ARE VERY PLEASED WITH THIS YEARS FUNDRAISING WHICH HAS BEEN DIRECTED MAINLY TOWARDS THE PURCHASE AND REFURBISHMENT COSTS OF THE NEW HIOLIDAY HOME.
		NA

Investment performance against objectives	Para 1.41	
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	DELIGHTED WITH THE FUNDRAISING MADE THIS YEAR.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	WE AIM TO HOLD RESERVES OF AT LEAST £200,000 TO FACILITATE THE REFURBISHMENT OF THE NEW HOLIDAY HOME.
Amount of reserves held	Para 1.22	£100, 000
Reasons for holding zero reserves	Para 1.22	N/A
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	NONE

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	WE HOLD 3 ANNUAL EVENTS 1. ANNUAL BALL 2. ANNUAL GOLF DAY 3. ANNUAL CHALLENGE
Investment policy and objectives including any social investment policy adopted	Para 1.46	N/A
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		TO PROVIDE TREASURE BOXES, HOLIDAYS AND GRANTS FOR FAMILIES EFFECTED BY CHILD BRAIN OR SPINAL TUMOURS
Type of governing document (trust deed, royal charter)	Para 1.25	TRUST DEED
How is the charity constituted? (e.g. unincorporated association, CIO)	Para 1.25	UNINCORPORATED
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	TRUST MEETINGS WITH ALL FOUR TRUSTEES

Additional information (optional)

You may choose to include further statements where relevant about:

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	THE INDEE ROSE TRUST
Other name the charity uses	N/A
Registered charity number	1132471
Charity's principal address	21 GEYLEN ROAD CANVEY ISLAND ESSEX SS8 8JN

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	R DOPSON			
2	J ALLEN			
3	A SMITH			
4	J MASON			
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
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)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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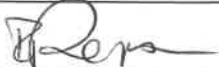
Other optional information

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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)	RUSSELL DOPSON	
Position (eg Secretary, Chair, etc)	TRUSTEE	
Date	15.05.26	

account 1 13143457	
cashflow account	
opening balance	10,173.11
debits	73,495.19
credits	66,400.97
diff	(7,094.22)
counter credits	16,136.49
loyalty rewards	1.20
donations	40,228.73
paypal giving	0.00
refunds / represented	34.55
virgin money giving	0.00
transfers in	10,000.00
transfers out	34,100.00
banking charges	129.60
cash withdrawals	0.00
website	517.06
unpaid cheque	0.00
expenses / petrol / phone	440.05
holiday homes costs	6,602.76
insurance	634.61
event costs / merchandise	8,804.15
pps / printing posting / office	1,037.73
toys / treasure boxes	21,229.23
chqs	0.00
total	(7,094.22)
opening balance	10,173.11
closing balance	3,078.89
profit	(7,094.22)

FUNDRAISING COSTS	8,804.15
GRANTS	0.00
TREASURE BOX TOYS	21,229.23
PRINT/POSTING/PETROL/INSURANCE	2,112.39
PROPERTY COSTS	466,967.30
CHEQUES	3,751.11
FINANCIAL CHARGES	354.55
EXPENSES	6,602.76
WAGES	7,308.00
SUBSCRIPTION COSTS	1,078.66
SOCIAL MEDIA	0.00
TRANSFERS OUT	68,600.00
	586,808.15
	586,808.15
	0.00

account 2 23125874	
holding account	
opening balance	530,400.66
debits	488,709.51
credits	165,633.02
diff	-323,076.49
loyalty rewards	1.80
st giving / caf / fundraising	105,031.22
transfers in	58,600.00
refund	2,000.00
propertry purchase	451,916.66
justgiving.com charges	561.60
transfers out	10,000.00
wages	7,308.00
cheques	3,751.11
holiday rent costs	15,050.64
banking charges	121.50
total	-323,076.49
opening balance	530,400.66
closing balance	207,324.17
diff	-323,076.49
10,173.11	
66,400.97	
(73,495.19)	

check	73,495.19
	488,709.51
	24,603.45
	586,808.15
spending	518,208.15

	Ac 1	Ac 2	Ac 3
Transfers in	10,000.00	58,600.00	0.00
Transfers out	34,100.00	10,000.00	24,500.00
Opening Cash	541,098.10	in	68,600.00
		out	68,600.00
Receipts	258,469.24		0.00
Payments	586,808.15		
Transfers net	0.00		
Total	<u>212,759.19</u>		
Closing balance	<u>212,759.19</u>		
Check	0.00		
check	-328,338.91		



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

THE INDEE ROSE TRUST

**On accounts for the year
ended**

16 JULY 2025

**Charity no
(if any)**

1132471

Set out on pages

1 TO 2

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **16.07.25**

**Responsibilities and
basis of report**

As the charity trustees, you are responsible for the preparation of the accounts in accordance with 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 all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent
examiner's statement**

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. *Delete [] if not applicable.*

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,:

- the accounting records were not kept in accordance with section 130 of the Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report 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:

15.05.26

Name:

GAVIN LAWRENCE

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

ACMA

Address:

ASPECT HOUSE, HONEYWOOD ROAD, BASILDON, ESSEX.

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 details of any items that the examiner wishes to disclose.

Confirmed property in Charity name .