

THE GENERAL JAN ZYGMUNT EMIL BEREK & IRENA BOGUMILA BEREK CHARITABLE TRUST

England & Wales · Charity number 1150135

Details

Other names THE BEREK TRUST

Status Registered

Legal form Trust

Registered 2012-12-12

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

Contact

Address 158-160 Broadway
West Ealing
London
W13 0TL

Phone 020 8840 2572

Email eks@sbs-law.co.uk

Activities

Objects: TO PROMOTE THE EDUCATION OF POLISH STUDENTS OF LIMITED FINANCIAL MEANS OR WHO WOULD OTHERWISE BE UNABLE TO ACCESS FURTHER EDUCATION TO ENABLE THEM TO BE EDUCATED IN THE UNITED KINGDOM AT UNIVERSITY OR OTHER INSTITUTIONS OF HIGHER EDUCATION THROUGH THE PROVISION OF GRANTS AND SCHOLARSHIPS AND SUBJECT TO THAT FOR OR TOWARDS SUCH CHARITABLE PURPOSES AS THE TRUSTEES THINK FIT.

Activities: To promote the education of Polish students of limited financial means or who would otherwise be unable to access further education. To enable them to be educated in the United Kingdom at University or other institutions of Higher Education through the provision of grants and scholarships and, subject to that, for or towards such charitable purposes as the Trustees think fit.

Classification

- **How:** Makes Grants To Individuals
- **What:** Education/training
- **Who:** Other Defined Groups

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£19,651	£203,800	-	-
2024-03-31	£26,466	£78,835	-	-
2023-03-31	£7,105	£168,990	-	-
2022-03-31	£15,380	£164,477	-	-
2021-03-31	£177,273	£167,107	-	-

Trustees

Name	Role	Appointed
Dr JACEK ADAM JANISZEWSKI	Chair	2012-12-07
Dr ZBIGNIEW JULIUSZ CIECHANOWICZ		2012-12-07
ROMA PALUCH		2012-12-07

THE GENERAL JAN ZYGMUNT EMIL BEREK & IRENA BOGUMILA BEREK CHARITABLE TRUST

England & Wales - Charity number 1150135

Accounts

**THE GENERAL JAN ZYGMUNT EMIL BEREK & IRENA BOGUMILA BEREK
CHARITABLE TRUST**

158 Broadway, West Ealing London W13 0TL

TRUSTEES' REPORT

FOR THE PERIOD 1.04.2023 - 31.03.2024

**THE GENERAL JAN ZYGMUNT EMIL BEREK & IRENA BOGUMILA BEREK
CHARITABLE TRUST
158 Broadway, West Ealing London W13 0TL**

TRUSTEES' REPORT

The Trustees' Annual Report for the purpose of Chapter 4, Section 162 of the Charities Act 2011.

CONSTITUTION OF THE CHARITY

The Charity was founded on 15th September 2008 and is governed by its Declaration of Trust. The Charity Registration No. is 1150135.

The Trustees act as a Council of Management. The Chairperson for the reporting year was Dr Jacek Janiszewski and the Secretary is Mrs Elzbieta Kornaga-Szydłowska. The current Trustees are: Dr Jacek Janiszewski, Dr Zbigniew Ciechanowicz, and Ms Roma Paluch (Legal Advisor). The principal offices and registered address of the Charity is: 158 Broadway, West Ealing London W13 0TL.

Independent Examiner: Frances Braidford FCCA
Dauman & Co Ltd Chartered Accountants & Registered Auditors
9 Station Parade
Uxbridge Road
London W5 3LD

THE OBJECTIVES OF THE CHARITY ARE:

To promote the education of Polish students of limited means or who would otherwise be unable to access further education to enable them to be educated in the United Kingdom at university or other institutions of higher education through the provision of grants and scholarships and subject to that for or towards such charitable purposes as the Trustees think fit.

STATEMENT OF THE TRUSTEES' RESPONSIBILITIES:

In accordance with the Trust's objectives the Trustees are responsible for considering applications from students, assessing their suitability and deciding which students to sponsor and to what extent, to fund the students in accordance with the Trust's agreed procedures; to liaise with the students on a regular basis and monitor their progress.

The Trustees monitor students' progress by receiving termly updates of courses covered and grades achieved as well as an annual report summarising the year's studies, achievements, and how these are benefiting the students. They also obtain an annual report from the students' personal tutors.

The Trustees are required to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the results of the charity for that year. In preparing these financial statements, the Trustees are required to:

1. select suitable accounting policies and then apply them consistently;
2. make judgements and estimates that are reasonable and prudent;
3. prepare the financial statements on the on-going concern basis unless it is inappropriate to presume that the charity will continue in business.

The Trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the Trust. They are also responsible for safeguarding the assets of the Trust and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities. The Trustees confirm that they have had regard to the Charity Commission's public benefit guidance.

REVIEW OF ACTIVITIES AND POLICY

The Trustees held two meetings in the reporting year on 9th June 2023 and 19th January 2024. Having found during Covid that virtual meetings were very successful and time as well as cost saving, the meetings were held online by means of Zoom. The Trustees continue to find this medium an efficient means of conducting business.

The Trust's activities are being promoted to a greater audience of potential students through the Charities Commission Reports and by word of mouth.

During the course of the reporting year the Trustees have sponsored a wide variety of qualifying applicants including students at different universities and in a diverse range of subjects - amongst others: -music; economics and management; law; marketing and stage management. All students have benefited from the sponsorship received. Two students summarised these benefits in the following words "My incredible privilege of studying in Oxford would be impossible without your [Trust's] support. Because of this, my education, research, and extracurricular activity there have only been enabled thanks to your aid. [...] This year's studies have vastly advanced my Economics and Strategy knowledge, jump-starting my journey to become a well-versed economist. The combination of subjects from every branch of Economics has prepared me well for future advanced studies, and will allow me to ground my work in the broad scope of economic theory. [...]; "I would not have been able to study [...] if not for the Trust's support. None of the achievements and personal developments that I have described [...] would have been possible [...] This is a privilege which I want to recognise and which could have not been possible without the Trust's support".

Due to a significant increase in fees and costs the Trustees agreed that they will sponsor a maximum of 5 students in total in the next academic year.

A Kay Pietron & Paluch Solicitors LLP that served the Trust closed on 30.9.2023. The Trust's management was taken over by the Sweetman Burke & Sinker Solicitors of 158-160 Broadway West Ealing London W13 0TL. RP who is the Solicitor Trustee has moved from A Kay Pietron & Paluch Solicitors LLP and is now an independent consultant at Sweetman Burke & Sinker Solicitors.

The Trust is tax exempt.

RISK

With regard to risk, the Trust has identified two areas to which it is likely to be exposed. The first concerns fraudulent requests for assistance. The Trust therefore places the greatest stress on rigorous verification of all the requests for grants which it may receive and will always have regard to the

possibility that such requests may be fraudulent. With this in mind, procedures are in place for the thorough and effective investigation of grant requests, as also for following up on the delivery of grants. These procedures will be constantly monitored and reviewed.

The second area of possible risk concerns the Trust's investments. These are reviewed regularly. The Trustees are aware of the current instability of the markets but remain confident that the investments are appropriate and sound. In this they rely on the advice of an Independent Financial Adviser. Returns to date have been profitable for the Trust, despite the unstable political, medical and financial climate.

Risk Assessment is considered at every meeting of the Trustees who meet twice a year. Thus the Trustees remain confident that all areas of potential risk have been scrutinised and are monitored carefully.

PLANS FOR THE FUTURE

The Trust intends to continue sponsoring a wide variety of students awarding long term grants, reviewing the extent of funding dependent on the students satisfying the Trustees that they are achieving a suitable standard of education. It will continue to consider further applications from potential students and their suitability for sponsorship within the criteria of the Trust's objectives.

In view of the Trust's extensive appeal to a wide variety of students, and the substantial increase in applications, the Trust has agreed a standard level of sponsorship in order to be fair and consistent in grants offered. It will look to maintain administrative workload at a manageable level while increasing the number of students the Trust is able to support.


.....
Jacek Janiszewski


.....
Zbigniew Ciechanowicz


.....
Roma Paluch

Date 13 December 2024

**THE GENERAL JAN ZYGMUNT EMIL BEREK & IRENA BOGUMILA BEREK
CHARITABLE TRUST
Charity number 1150135**

**RECEIPTS AND PAYMENTS ACCOUNT
FOR THE PERIOD FROM 01.04.2023 – 31.03.2024**

RECEIPTS

Interest Received – Aviva & Scottish Widows	6,493
Dividends – Aviva & Scottish Widows	3,926
Equalisation – Aviva Scottish Widows	500
Aviva Investment – Increase in valuation	13,879
Scottish Widows – Increase in valuation	1668

Total Receipts	£26,466
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PAYMENTS

Fees – A Kay Pietron & Paluch	15,613
Fees – Sweetman Burke & Sinker	2,390
Dauman & Co	540
Trustee meeting expenses	-
Investment charges – Aviva & Scottish Widows	5,109
Grave maintenance	153
Grants to students	55,030

Total Payments	£78,835
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Net Income/(Expenditure)	(52,369)
Cash Funds 01.04.2023	582,017

Cash Funds 31.03.2024	£529,648
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THE GENERAL JAN ZYGMUNT EMIL BEREK & IRENA BOGUMILA BEREK
CHARITABLE TRUST
Charity number 1150135

STATEMENT OF ASSETS AND LIABILITIES
AS AT 31.03.2024

CASH FUNDS

Aviva Investment – per valuation 11/04/2024	273,661
Scottish Widows Investment – per valuation 21/02/2024	200,079
Sweetman Burke & Sinker Client Account	55,908

Total Cash Funds	£529,648
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LIABILITIES

NIL
=====

Approved on behalf of the Trustees by:

Z. Ciechanowicz
.....
Dr Zbigniew Ciechanowicz

12.12.2024
.....
Date

Independent Examiner's Report to the Trustees of The General Jan Zygmunt Emil Berek & Irena Bogumila Berek Charitable Trust (Charity Number 1150135)

I report on the Accounts of the Trust for the year ended 31 March 2024 which are attached.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for the year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedures laid down in the General Directions given by the Charity Commissioners under section 145(5)(b) of the 2011 Act; and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out below.

Independent examiner's statement

In the course of my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that, in any material respect, the trustees have not met the requirements to ensure that:
 - proper accounting records are kept in accordance with section 130 of the 2011 Act; and
 - accounts are prepared which agree with the accounting records and comply with the accounting requirements of the 2011 Act; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Frances Braidford
.....

Frances Braidford, FCCA
Dauman & Co Limited
9 Station Parade, Uxbridge Road,
Ealing Common, London, W5 3LD

Date: 15 November 2024

THE GENERAL JAN ZYGMUNT EMIL BEREK & IRENA BOGUMILA BEREK CHARITABLE TRUST

England & Wales - Charity number 1150135

Accounts

**THE GENERAL JAN ZYGMUNT EMIL BEREK & IRENA BOGUMILA BEREK
CHARITABLE TRUST**

371 Uxbridge Road, London W3 9RH

TRUSTEES' REPORT

FOR THE PERIOD 1.04.2020 - 31.03.2021

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The principal offices and registered address of the Charity is: 371 Uxbridge Road, London W3 9RH.

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REVIEW OF ACTIVITIES AND POLICY

The Trustees hold two meetings a year usually in June and December.

The Trust's activities are being promoted to a greater audience of potential students through the Charities Commission Reports and by word of mouth and applications have increased significantly.

During the course of the reporting year the Trustees have sponsored a wide variety of qualifying applicants including students at different universities and in a diverse range of subjects: biomedical science, mathematics, film practice, acting, animation, law, group psychotherapy, architecture and contemporary dance. All students have benefited from the sponsorship received. One student summarized these benefits in the following words " ...the support from the Berek Trust means everything to me: I can develop my passion without being concerned about the financial situation. I have been able to really grow as an artist and as a human being ..."

During the reporting year, studies were disrupted due to the Covid-19 pandemic with studies being conducted virtually and online. Thus the students' achievements are even more praiseworthy than normal.

The Trust is tax exempt.

RISK

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Jacek Janiszewski

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Zbigniew Ciechanowicz

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Roma Paluch

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Jacek Janiszewski

Z. Ciechanowicz
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Zbigniew Ciechanowicz

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Roma Paluch

Date *21 January 2022*

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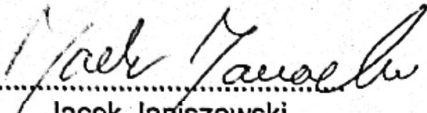
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Date

THE GENERAL JAN ZYGMUNT EMIL BEREK & IRENA BOGUMILA BEREK
CHARITABLE TRUST
Charity number 1150135

STATEMENT OF ASSETS AND LIABILITIES
AS AT 31.03.2021

CASH FUNDS

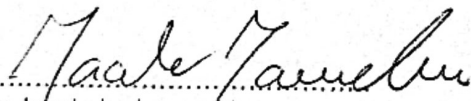
Aviva Investment	268,884
Advance (Zurich) Investment	601,892
HSBC - A Kay Pietron & Paluch Client Account	22,223

Total Cash Funds	£892,999
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LIABILITIES

NIL
=====

Approved on behalf of the Trustees by:


.....
Dr Jacek Janiszewski

.....
Date

Independent Examiner's Report to the Trustees of The General Jan Zygmunt Emil Berek & Irena Bogumila Berek Charitable Trust (Charity Number 1150135)

I report on the Accounts of the Trust for the year ended 31 March 2021 which are set out on pages 4 to 5.

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Frances Braidford
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Frances Braidford, FCCA
Dauman & Co Limited

9 Station Parade, Uxbridge Road, Ealing Common, London, W5 3LD

Date:11/12/2021.....