

THE SOCIETY OF JEWELLERY HISTORIANS

England & Wales · Charity number 1151393

Details

Other names	SJH
Status	Registered
Legal form	Charitable company
Company number	07032947
Registered	2013-03-26
Register	View on the Charity Commission register

Contact

Address	Scientific Research-British Museum Great Russell Street London WC1B 3DG
Phone	02089467207
Email	info@societyofjewelleryhistorians.ac.uk
Website	societyofjewelleryhistorians.ac.uk

Activities

Objects: TO ADVANCE PUBLIC EDUCATION BY PROMOTING (WHETHER BY FORMAL MEETINGS LECTURES OR OTHERWISE) THE STUDY AND THE MAKING KNOWN OF THE HISTORY AND DEVELOPMENT OF THE CRAFT AND CRAFTSMEN CONNECTED WITH THE MANUFACTURE DESIGN AND PROCESSES CONCERNING JEWELLERY.

Activities: Education by lectures and publications

Classification

- **How:** Other Charitable Activities
- **What:** Education/training, Arts/culture/heritage/science
- **Who:** The General Public/mankind

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-09-30	£45,011	£29,726	-	-
2024-09-30	£38,885	£31,513	-	-
2023-09-30	£37,017	£31,302	-	-
2022-09-30	£40,112	£25,258	-	-
2021-09-30	£112,366	£13,360	-	-

Trustees

Name	Role	Appointed
KATHERINE FRANCOISE PURCELL	Chair	2013-03-03
Dr Aude Mongiatti		2020-02-25
Dr LYNNE BARTLETT PHD		2013-12-16
Dr NIAMH WHITFIELD		2013-12-16
Hazel Forsyth		2018-02-27
JANE PERRY		2013-12-16
Judith Ann Rudoie		2013-06-23
Lucina Emily Orr Ms		2023-11-28
MAUREEN CERRONE		2013-12-16
Patricia Susan Topping		2024-01-23
ROBERT EUSTACE WALTER LEIGH-PEMBERTON		2025-03-25
Sarah Jane Rothwell		2024-02-13

THE SOCIETY OF JEWELLERY HISTORIANS

England & Wales - Charity number 1151393

Accounts

THE SOCIETY OF JEWELLERY HISTORIANS

**Registered Charity Number: 1151393
Company Limited by Guarantee: 7032947**

**THE SOCIETY OF JEWELLERY HISTORIANS
(incorporated)**

FINANCIAL STATEMENTS

FOR THE YEAR ENDED 30 SEPTEMBER 2025

Address: Scientific Research
The British Museum
London
WC1B 3DG

**Contents of the Financial Statements
For the Year Ended 30 September 2025**

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THE SOCIETY OF JEWELLERY HISTORIANS

Trustees Annual Report

This year saw the first of what it is hoped will be a regular annual joint meeting with the Silver Society held at the Society of Antiquaries and streamed live. The event proved very popular and was well attended by members of both Societies.

A very successful day-long symposium themed around beads in all their manifestations was held in June with speakers and delegates from many countries. In addition to the regular lectures at the Society of Antiquaries, which are now streamed live, the Society arranged visits for members to the Miniatures Exhibition at Compton Verney and early morning views of the Mughal Exhibition at the V&A and the very successful Brooches Exhibition at Wartski's.

During the year, after many successful years editing Jewellery History Today(JHT), Kirstin Kennedy and Jane Perry handed over to a new editorial team headed by Ella Mackenzie. The continued popularity of JHT with members is attributable to the hard work of the team led by Kirstin.

It is the opinion of the Trustees that the Society has more than sufficient reserves to remain a going concern for the foreseeable future, and for well in excess of the next twelve months.

THE SOCIETY OF JEWELLERY HISTORIANS

Statement of Council Members' Responsibilities

The Council members are required under the Charities Act 1993 to prepare financial statements for each financial year which give a true and fair view of the Society's financial activities during the year and of its financial position at the end of that year. In preparing financial statements, the Council should:

- select suitable accounting policies and apply them consistently;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures and explained in the financial statements;
- prepare the financial statements on a going concern basis unless it is inappropriate to presume that the Society will continue in operation.

The Council members are responsible for keeping proper accounting records which disclose with reasonable accuracy the financial position of the society and which enable them to ascertain the financial position of the society and which enable them to ensure that the financial statements comply with applicable law and regulations. They are also responsible for safeguarding the assets of the charity and hence taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Council on 27th January 2026 and signed on its behalf



Hon Treasurer

THE SOCIETY OF JEWELLERY HISTORIANS

INCOME AND EXPENDITURE ACCOUNT

at 30 SEPTEMBER 2025 at 30 SEPTEMBER 2024

	£	£	£	£
INCOME				
Subscriptions	32,188		30,899	
Gift Aid	1,543		1,301	
Symposia & Private Views	4,948		20	
Publications	150		165	
Advertising	700		950	
Bank Interest	4,987		5,497	
Donations	<u>495</u>		<u>53</u>	
		<u>45,011</u>		<u>38,885</u>
EXPENDITURE				
Hire of Halls	6,171		7,415	
Symposia & Private Views	2,799		1,059	
Lectures, Meetings & Sundry	1,811		2,431	
Newsletter Publication (Jewellery History Today)	4,505		4,930	
Newsletter Distribution (Jewellery History Today)	8,118		7,818	
Jewellery Studies	1,896		2,353	
Secretarial Fees	1,910		3,373	
Printing, Postage & Stationery	36		39	
Website/brochure redesign	252		1,171	
Bank Charges	931		925	
Miscellaneous items	<u>1,298</u>		<u>0</u>	
		<u>29,726</u>		<u>31,513</u>
Unrealised gain/loss on investments	-1,434		10,475	
EXCESS/(DEFICIT) OF INCOME OVER EXPENDITURE		<u>13,851</u>		<u>17,846</u>

THE SOCIETY OF JEWELLERY HISTORIANS

BALANCE SHEET

at 30 SEPTEMBER 2025 at 30 SEPTEMBER 2024

	£	£	£	£
FIXED ASSETS				
Investments				
COIF Investment Account	92,417		93,852	
		<u>92,417</u>		<u>93,852</u>
CURRENT ASSETS				
Bank and cash				
COIF Deposit Account	115,715		110,727	
HSBC Current Account	36,917		29,767	
PayPal Account	1,077		1,233	
		<u>153,709</u>		<u>141,727</u>
CURRENT LIABILITIES				
Net liabilities	1,594		-1709	
NET CURRENT ASSETS		<u>155,303</u>		<u>140,018</u>
TOTAL ASSETS (less current liabilities)		<u>247,720</u>		<u>233,869</u>
Financed by:				
CAPITAL ACCOUNT				
General funds brought forward	233,869		216,023	
Surplus/ (Deficit) for the year	13,851		17,846	
General funds carried forward		<u>247,720</u>		<u>233,869</u>

Approved by the Council on 27th January 2026 and signed on its behalf



Hon Treasurer



Report to the trustees/ members of

The Society of Jewellery Historians

On accounts for the year ended

30th September 2025

Charity no 1151393

Set out on pages

1 – 5

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30 September 2025.

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

Responsibilities and basis of report

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

I have completed my examination. I confirm that no material matters have come to my attention in connection with the which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities 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.

Signed: *PA Sadler*

Date: 27 January 2026

Name: Philip Sadler

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

FCCA, ACIE

Address: Ledgeland, St Margaret's Road, St Margaret's Bay, Kent

THE SOCIETY OF JEWELLERY HISTORIANS

England & Wales - Charity number 1151393

Accounts

THE SOCIETY OF JEWELLERY HISTORIANS

Registered Charity Number: 1151393
Company Limited by Guarantee: 7032947

THE SOCIETY OF JEWELLERY HISTORIANS
(incorporated)

FINANCIAL STATEMENTS

FOR THE YEAR ENDED 30 SEPTEMBER 2024

Address: Scientific Research
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For the Year Ended 30 September 2024

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THE SOCIETY OF JEWELLERY HISTORIANS

Trustees Annual Report

With an increasing number of members worldwide and the escalating postage costs, both in the UK and overseas, the costs of sending out Jewellery History Today have substantially increased. As this is a valued part of our offer to members, the Council have agreed to maintain JHT as a print publication. The Society is now publishing regular Jewellery Studies papers Online, and live-streaming and recording (where speakers agree) the lectures at the Society of Antiquaries.

The withdrawal of .ac.uk domains by our web hosting company necessitated the transfer of our website to a new host. This complex task was smoothly and efficiently performed within the short time frame allowed by our webmaster and trustee, Jane Perry.

It is the opinion of the Trustees that the Society has more than sufficient reserves to remain a going concern for the foreseeable future, and for well in excess of the next twelve months. The Society is very aware that a number of Trustees have served for more than 9 years. The Council considers that their specific skills, together with their corporate memory, remain extremely valuable to the Society. The Council does, however, actively look for new Trustees with the requisite range of abilities.

THE SOCIETY OF JEWELLERY HISTORIANS

Statement of Council Members' Responsibilities

The Council members are required under the Charities Act 1993 to prepare financial statements for each financial year which give a true and fair view of the Society's financial activities during the year and of its financial position at the end of that year. In preparing financial statements, the Council should:

- select suitable accounting policies and apply them consistently;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures and explained in the financial statements;
- prepare the financial statements on a going concern basis unless it is inappropriate to presume that the Society will continue in operation.

The Council members are responsible for keeping proper accounting records which disclose with reasonable accuracy the financial position of the society and which enable them to ascertain the financial position of the society and which enable them to ensure that the financial statements comply with applicable law and regulations. They are also responsible for safeguarding the assets of the charity and hence taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Council on 28th January 2025 and signed on its behalf



Hon Treasurer

THE SOCIETY OF JEWELLERY HISTORIANS

INCOME AND EXPENDITURE ACCOUNT

at 30 SEPTEMBER 2024 at 30 SEPTEMBER 2023

	£	£	£	£
INCOME				
Subscriptions	30,899		29,521	
Gift Aid	1,301		1,250	
Symposia & Private Views	20		1,300	
Publications	165		346	
Advertising	950		950	
Bank Interest	5,497		3,650	
Donations	<u>53</u>		<u>0</u>	
		<u>38,885</u>		<u>37,017</u>
EXPENDITURE				
Hire of Halls	7,415		7,331	
Symposia & Private Views	1,059		2,896	
Lectures, Meetings & Sundry	2,431		3,196	
Newsletter Publication (Jewellery History Today)	4,930		5,707	
Newsletter Distribution (Jewellery History Today)	7,818		3,948	
Jewellery Studies	2,353		1,720	
Secretarial Fees	3,373		4,811	
Printing, Postage & Stationery	39		786	
Website/brochure redesign	1,171		153	
Bank Charges	925		754	
Accountancy	<u>0</u>		<u>0</u>	
		<u>31,513</u>		<u>31,302</u>
Unrealised gain/loss on investments	10,475		3,460	
EXCESS/(DEFICIT) OF INCOME OVER EXPENDITURE		<u>17,846</u>		<u>9,175</u>

THE SOCIETY OF JEWELLERY HISTORIANS

BALANCE SHEET

at 30 SEPTEMBER 2024 at 30 SEPTEMBER 2023

	£	£	£	£
FIXED ASSETS				
Investments				
COIF Investment Account	93,852		83,376	
		<u>93,852</u>		<u>83,376</u>
CURRENT ASSETS				
Bank and cash				
COIF Deposit Account	110,727		105,230	
HSBC Current Account	29,767		23,549	
PayPal Account	1,233		1,157	
		<u>141,727</u>		<u>129,936</u>
CURRENT LIABILITIES				
Net liabilities	-1,709		2,711	
NET CURRENT ASSETS		<u>140,018</u>		<u>132,647</u>
TOTAL ASSETS (less current liabilities)		<u>233,869</u>		<u>216,023</u>
Financed by:				
CAPITAL ACCOUNT				
General funds brought forward	216,023		206,848	
Surplus/ (Deficit) for the year	17,846		9,175	
General funds carried forward		<u>233,869</u>		<u>216,023</u>

Approved by the Council on 28th January 2025 and signed on its behalf



Hon Treasurer



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the
accounts

Report to the trustees/ members of

The Society of Jewellery Historians

On accounts for the year ended

30th September 2024

Charity no (if any) 1151393

Set out on pages

1 – 5

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

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

Responsibilities and basis of report

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 I have completed my examination. I confirm that no material matters have come to my attention in connection with the which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities 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.

Signed: *PA Sadler*

Date: 28 January 2025

Name: Philip Sadler

Relevant professional qualification(s) or body: FCCA, ACIE

Address: Ledgeland St Margaret's Road

St Margaret's Bay, Kent

THE SOCIETY OF JEWELLERY HISTORIANS

England & Wales - Charity number 1151393

Accounts

THE SOCIETY OF JEWELLERY HISTORIANS

**Registered Charity Number: 1151393
Company Limited by Guarantee: 7032947**

**THE SOCIETY OF JEWELLERY HISTORIANS
(incorporated)**

FINANCIAL STATEMENTS

FOR THE YEAR ENDED 30 SEPTEMBER 2023

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THE SOCIETY OF JEWELLERY HISTORIANS

Trustees Annual Report

The increased membership numbers, attributed in part to the online lectures reaching a global audience, have been maintained. Live streaming of the lectures at the Society of Antiquaries is now a permanent feature of the Society's offer to members.

The first of the planned 'new research short presentations' was successfully trialled with speakers both in person and online.

After the unrealised loss from the Society's COIF Investment Fund it has shown an unrealised profit this year.

It is the opinion of the Trustees that the Society has more than sufficient reserves to remain a going concern for the foreseeable future and for well in excess of the next twelve months.

The Trustees are aware of the Charity Commission's guidance about Trustees serving more than eight consecutive years. Although this relates to several Trustees, it is considered that the Charity benefits hugely from their services and from their corporate memory. Nevertheless, further Trustees are being sought.

THE SOCIETY OF JEWELLERY HISTORIANS

Statement of Council Members' Responsibilities

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The Council members are responsible for keeping proper accounting records which disclose with reasonable accuracy the financial position of the society and which enable them to ascertain the financial position of the society and which enable them to ensure that the financial statements comply with applicable law and regulations. They are also responsible for safeguarding the assets of the charity and hence taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Council on 23rd January 2024 and signed on its behalf



Hon Treasurer

THE SOCIETY OF JEWELLERY HISTORIANS

INCOME AND EXPENDITURE ACCOUNT

at 30 SEPTEMBER 2023 at 30 SEPTEMBER 2022

	£	£	£	£
INCOME				
Subscriptions	29,521		29,405	
Gift Aid	1,250		1,438	
Symposia & Private Views	1,300		3,565	
Publications	346		571	
Advertising	950		950	
Bank Interest	3,650		458	
Donations	<u>0</u>		<u>3,725</u>	
		<u>37,017</u>		<u>40,112</u>
EXPENDITURE				
Hire of Halls	7,331		4,568	
Symposia & Private Views	2,896		725	
Secretarial Fees	4,811		5,509	
Printing, Postage & Stationery	786		1,202	
Newsletter Publication (Jewellery History Today)	5,707		4,298	
Newsletter Distribution (Jewellery History Today)	3,948		2,868	
Bank Charges	754		1,309	
Jewellery Studies	1,720		2,828	
Accountancy	0		0	
Website/brochure redesign	153		146	
Lectures, Meetings & Sundry	<u>3,196</u>		<u>1,805</u>	
		<u>31,302</u>		<u>25,258</u>
Unrealised gain/loss on investments	3,460		-2,726	
EXCESS/(DEFICIT) OF INCOME OVER EXPENDITURE		<u>9,175</u>		<u>12,128</u>

THE SOCIETY OF JEWELLERY HISTORIANS

BALANCE SHEET

at 30 SEPTEMBER 2023 at 30 SEPTEMBER 2022

	£	£	£	£
FIXED ASSETS				
Investments				
COIF Investment Account	83,376		79,917	
		<u>83,376</u>		<u>79,917</u>
CURRENT ASSETS				
Bank and cash				
COIF Deposit Account	105,230		101,580	
HSBC Current Account	23,549		26,319	
PayPal Account	1,157		785	
		<u>129,936</u>		<u>128,684</u>
Debtors	2,711			
TOTAL CURRENT ASSETS		<u>132,647</u>		<u>128,684</u>
CURRENT LIABILITIES				
Creditors			1,753	
NET CURRENT ASSETS		<u>132,647</u>		<u>126,931</u>
TOTAL ASSETS (less current liabilities)		<u>216,023</u>		<u>206,848</u>
Financed by:				
CAPITAL ACCOUNT				
General funds brought forward	206,848		194,720	
Surplus/ (Deficit) for the year	9,175		12,128	
General funds carried forward		<u>216,023</u>		<u>206,848</u>

Approved by the Council on 23rd January 2024 and signed on its behalf



Hon Treasurer



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

The Society of Jewellery Historians

**On accounts for the year
ended**

30th September 2023

**Charity no
(if any)**

1151393

Set out on pages

1 – 5

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

**Responsibilities and
basis of report**

As the charity's trustees, 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 all 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 which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities 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.

Signed:

PA Sadler

Date:

23 January 2024

Name:

Philip Sadler

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

FCCA, ACIE

Address:

Ledgeland St Margaret's Road

St Margaret's Bay, Kent

THE SOCIETY OF JEWELLERY HISTORIANS

England & Wales - Charity number 1151393

Accounts

THE SOCIETY OF JEWELLERY HISTORIANS

**Registered Charity Number: 1151393
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THE SOCIETY OF JEWELLERY HISTORIANS

Trustees Annual Report

The Society continued with its programme of on-line lectures in parallel with a popular return to live lectures at the Society of Antiquaries as regulations allowed post Covid. The increase in membership numbers due in part to the online lectures reaching a wider worldwide audience and the success of the postponed symposium meant an ongoing increase in administration costs.

Two important features of the accounts are the final payment for the indexing of all past publications and the receipt of the final cash transfer from the Bead Study Trust. New issues of both Jewellery History Today and Jewellery Studies will be indexed on a regular basis in future.

Although seen as a positive decision to hold funds in the COIF Deposit Fund the unfortunate timing of the Society's accounting year has meant that the accounts show an unrealised loss for the period.

It is the opinion of the Trustees that the Society has more than sufficient reserves to remain a going concern for the foreseeable future and certainly for well in excess of the next twelve months.

THE SOCIETY OF JEWELLERY HISTORIANS

Statement of Council Members' Responsibilities

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Approved by the Council on 17th January 2023 and signed on its behalf



Hon Treasurer

THE SOCIETY OF JEWELLERY HISTORIANS

INCOME AND EXPENDITURE ACCOUNT YEAR ENDED 30 SEPTEMBER 2022

	2022		2021	
	£	£	£	£
INCOME				
Subscriptions	29,405		25,541	
Gift Aid	1,438		1,487	
Symposia & Private Views	3,565		0	
Publications	571		45	
Advertising	950		1,300	
Bank Interest	458		7	
Donations	<u>3,725</u>		<u>83,986</u>	
		40,112		112,366
EXPENDITURE				
Hire of Halls	4,568		0	
Symposia & Private Views	725		0	
Secretarial Fees	5,509		3,673	
Printing, Postage & Stationery	1,202		1,182	
Newsletter Publication (Jewellery History Today)	4,298		3,066	
Newsletter Distribution (Jewellery History Today)	2,868		1,714	
Bank Charges	1,309		503	
Jewellery Studies	2,828		877	
Accountancy	0		0	
Website/brochure redesign	146		325	
Lectures, Meetings & Sundry	<u>1,805</u>		<u>2,020</u>	
		25,258		13,360
Unrealised loss on investments	-2,726		-156	
EXCESS/(DEFICIT) OF INCOME OVER EXPENDITURE		<u>12,128</u>		<u>98,850</u>

THE SOCIETY OF JEWELLERY HISTORIANS

BALANCE SHEET AS AT 30 SEPTEMBER 2022

	2022		2021	
	£	£	£	£
FIXED ASSETS				
COIF Investment Account	79,917		82,643	
		<u>79,917</u>		<u>82,643</u>
CURRENT ASSETS				
Trade Debtors	-		-	
COIF Deposit Account	101,580		101,122	
HSBC Current Account	26,319		12,146	
PayPal Account	<u>785</u>		<u>683</u>	
		<u>128,684</u>		<u>113,951</u>
CURRENT LIABILITIES				
Accruals		1,753		1,873
NET CURRENT ASSETS		<u>126,931</u>		<u>112,078</u>
TOTAL ASSETS (less current liabilities)		<u>206,848</u>		<u>194,720</u>
Financed by:				
CAPITAL ACCOUNT				
General funds brought forward	194,720		95,870	
Surplus/ (Deficit) for the year	12,128		98,850	
General funds carried forward		<u>206,848</u>		<u>194,720</u>

Approved by the Council on 17th January 2023 and signed on its behalf



Hon Treasurer

THE SOCIETY OF JEWELLERY HISTORIANS

England & Wales - Charity number 1151393

Accounts

THE SOCIETY OF JEWELLERY HISTORIANS

**Registered Charity Number: 1151393
Company Limited by Guarantee: 7032947**

**THE SOCIETY OF JEWELLERY HISTORIANS
(incorporated)**

FINANCIAL STATEMENTS

FOR THE YEAR ENDED 30 SEPTEMBER 2021

Address: Scientific Research
The British Museum
London
WC1B 3DG

**Contents of the Financial Statements
For the Year Ended 30 September 2021**

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THE SOCIETY OF JEWELLERY HISTORIANS

Trustees Annual Report

The Society continued with its programme of on-line lectures during the extended period of restrictions on physical lecture meetings due to the coronavirus. The popularity of the on-line offer has encouraged the Society to continue with this format and the first live lecture in September 2021 was also transmitted on-line. It is the intention of the Council to continue with a parallel offer of live and on-line lectures for the future. At least one lecture a year will be wholly online enabling the Society to invite speakers who would not be able to come to London to deliver their talks.

The publication of papers for Jewellery Studies has increased through the year and these are now freely available for open access on the website.

During the year the Society was approached by the Bead Study Trust whose trustees wished to wind up the existing charity and transfer their reserves to an appropriate charity with compatible aims. This process is almost complete and has increased the Society's reserves.

The Society's finances have been able to absorb the increased expenditure and remain healthy. It is the opinion of the Trustees that the Society has more than sufficient reserves to remain a going concern for the foreseeable future and certainly for well in excess of the next twelve months.

THE SOCIETY OF JEWELLERY HISTORIANS

Statement of Council Members' Responsibilities

The Council members are required under the Charities Act 1993 to prepare financial statements for each financial year which give a true and fair view of the Society's financial activities during the year and of its financial position at the end of that year. In preparing financial statements, the Council should:

- select suitable accounting policies and apply them consistently;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures and explained in the financial statements;
- prepare the financial statements on a going concern basis unless it is inappropriate to presume that the Society will continue in operation.

The Council members are responsible for keeping proper accounting records which disclose with reasonable accuracy the financial position of the society and which enable them to ascertain the financial position of the society and which enable them to ensure that the financial statements comply with applicable law and regulations. They are also responsible for safeguarding the assets of the charity and hence taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Council on 25th January 2022 and signed on its behalf



Hon Treasurer

THE SOCIETY OF JEWELLERY HISTORIANS

INCOME AND EXPENDITURE ACCOUNT YEAR ENDED 30 SEPTEMBER 2021

	2021		2020	
	£	£	£	£
INCOME				
Subscriptions	25,541		21,579	
Gift Aid	1,487		1,764	
Symposia & Private Views	0		0	
Publications	45		165	
Advertising	1,300		600	
Bank Interest	7		282	
Donations	<u>83,986</u>		<u>0</u>	
		112,366		24,390
EXPENDITURE				
Hire of Halls	0		3,326	
Symposia & Private Views	0		0	
Secretarial Fees	3,673		800	
Printing, Postage & Stationery	1,182		464	
Newsletter Publication (Jewellery History Today)	3,066		4,946	
Newsletter Distribution (Jewellery History Today)	1,714		2,828	
Bank Charges	503		439	
Jewellery Studies	877		438	
Accountancy	0		0	
Website/brochure redesign	325		618	
Lectures, Meetings & Sundry	<u>2,020</u>		<u>469</u>	
		13,360		14,328
Unrealised loss on investments	-156		0	
EXCESS/(DEFICIT) OF INCOME OVER EXPENDITURE		<u>98,850</u>		<u>10,062</u>

THE SOCIETY OF JEWELLERY HISTORIANS

BALANCE SHEET AS AT 30 SEPTEMBER 2021

	2021		2020	
	£	£	£	£
FIXED ASSETS				
COIF Investment Account	82,643		0	
		<u>82,643</u>		<u>0</u>
CURRENT ASSETS				
Trade Debtors	-		-	
COIF Deposit Account	101,122		79,954	
HSBC Current Account	12,146		19,447	
PayPal Account	<u>683</u>		<u>774</u>	
		<u>113,951</u>		<u>100,175</u>
CURRENT LIABILITIES				
Accruals		1,873		4,305
NET CURRENT ASSETS		<u>112,078</u>		<u>95,870</u>
TOTAL ASSETS (less current liabilities)		<u>194,720</u>		<u>95,870</u>
Financed by:				
CAPITAL ACCOUNT				
General funds brought forward	95,870		85,808	
Surplus/ (Deficit) for the year	98,850		10,062	
General funds carried forward		<u>194,720</u>		<u>95,870</u>

Approved by the Council on 25th January 2022 and signed on its behalf



Hon Treasurer

Independent examiner's report on the accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES

Section A Independent Examiner's Report

Report to the trustees/
members of

Charity Name

THE SOCIETY OF JEWELLERY HISTORIANS

On accounts for the year
ended

30 September 2021

Charity no
(if any)

1151393

Set out on pages

4 to 5

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30/09/2021.

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 this year under section 144 of the Charities Act 2011 ("the Charities Act") and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities 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 general Directions given by the Charity Commission. 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 in the statement below.

Independent examiner's
statement

In connection with my examination, no material matters have come to my attention which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities 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 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.

Signed:

Date:

25 January 2022

Name:

Philip Sadler

Relevant qualification(s)

FCCA AICE

Address:

Ledgeland, St Margaret's Road, St Margaret's Bay, Kent