

# THE FENIX TRAINING TRUST

England & Wales · Charity number 1151830

## Details

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**Status** Registered

**Legal form** CIO

**Registered** 2013-04-29

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

## Contact

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**Address** Higher Hill Farm  
Clayhidon  
Cullompton  
EX15 3TW

**Phone** 01823652600

**Email** [joannabroadbent@yahoo.co.uk](mailto:joannabroadbent@yahoo.co.uk)

**Website** [www.fenixtrust.co.uk](http://www.fenixtrust.co.uk)

## Activities

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**Objects:** (1) TO ADVANCE IN LIFE AND HELP YOUNG PEOPLE (UNDER THE AGE OF 25) THROUGH THE PROVISION OF FACILITIES FOR HORSE RIDING, CARRIAGE DRIVING AND OTHER AMATEUR EQUESTRIAN SPORTS IN THE INTERESTS OF SOCIAL WELFARE WITH THE OBJECT OF IMPROVING THEIR CONDITIONS OF LIFE.(2) TO RELIEVE THE NEEDS OF DISABLED PEOPLE THROUGH THE PROVISION OF FACILITIES FOR HORSE RIDING, CARRIAGE DRIVING AND OTHER AMATEUR EQUESTRIAN SPORTS WITH THE OBJECT OF IMPROVING THEIR CONDITIONS OF LIFE.(3) TO ADVANCE THE EDUCATION OF THE PUBLIC IN THE SUBJECT OF HORSE DRAWN TRANSPORT THROUGH LECTURES, DEMONSTRATIONS AND EVENTS AND BY THE ESTABLISHMENT AND MAINTENANCE OF A MUSEUM OF HORSE DRAWN VEHICLES.

**Activities:** To advance in life and help disabled and young people through the provision of facilities for horse riding, carriage driving and other amateur equestrian sports in the interests of social welfare To advance the education of the public in the subject of horse drawn transport through lectures, demonstrations and events and by the establishment and maintenance of a museum of horse drawn vehicles

## Classification

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- **How:** Provides Human Resources, Provides Buildings/facilities/open Space, Provides Services
- **What:** General Charitable Purposes, Education/training, Disability, Arts/culture/heritage/science, Amateur Sport
- **Who:** Children/young People, People With Disabilities, Other Charities Or Voluntary Bodies, The General Public/mankind

## Geography

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- Devon

## Finances

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Period end	Income	Expenditure	Assets	Employees
2024-12-31	£1,050	£3,905	-	-
2023-12-31	£5,155	£4,952	-	-
2022-12-31	£3,250	£5,770	-	-
2021-12-31	£1,610	£3,438	-	-
2020-12-31	£13,728	£9,810	-	-

## Trustees

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Name	Role	Appointed
IAN YULE	Chair	2013-03-12
ANDREW WALKER		2013-03-12
JOANNA BROADBENT		2013-03-12
LYNNE KAREN WRIGHT		2014-01-02

**THE FENIX TRAINING TRUST**

England & Wales - Charity number 1151830

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# Accounts

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**THE FENIX TRAINING TRUST  
(A CHARITABLE INCORPORATED ORGANISATION)**

**REPORT AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 DECEMBER 2024**

**THE FENIX TRAINING TRUST  
(A CHARITABLE INCORPORATED ORGANISATION)**

**REPORT AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 DECEMBER 2024**

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## THE FENIX TRAINING TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024

The Trustees are pleased to present their report, together with the financial statements of the charity, for the year ended 31 December 2024.

#### REFERENCE AND ADMINISTRATIVE DETAILS

<b>Charity number</b>	1151830
<b>Principal Address</b>	Higher Hill Farm Clayhidon Cullompton Devon EX15 3TW
<b>Bankers</b>	Barclays Bank 26 Fore Street Wellington Somerset TA21 8AN

#### Trustees

The trustees serving during the year and since the year end were as follows:

Ian Yule (chair)  
Joanna Broadbent (Secretary)  
Andrew Walker  
Lynne Wright

#### STRUTURE, GOVERNANCE AND MANAGEMENT

##### Governing document

The Fenix Training Trust is a Charitable Incorporated Organisation (CIO) governed by its Constitution adopted at its inaugural meeting on 9th May 2013 following confirmation by the Charity commission of its registered charity status on 29th April 2013.

##### Appointment of Trustees

As set out in the constitution, there must be at least three charity trustees and not more than twelve. The trustees are also the members of the CIO and have no liability to contribute to its assets if it is wound up and no personal responsibility for settling its debts and liabilities.

Apart from the initial trustees, every trustee so appointed for a term of three years although they can offer themselves for re-appointment and retire by notifying the CIO in writing.

Appointment is by a resolution passed at a properly convened meeting of the CIO trustees.

## THE FENIX TRAINING TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024 (Contd.)

#### Organisation

The board of trustees administers the charity and meets at least twice a year.

In planning our activities, we kept in mind the Charity Commissioner's guidance on public benefit. We have continued to communicate on a regular basis by phone and meet as required.

#### Risk Management

The trustees conducted a review of the major risks which the charity was exposed and continue, where appropriate, have systems or procedures to mitigate the risks the charity faces. Procedures are in place to ensure compliance with health and safety of staff, volunteers, clients and visitors to the centre.

#### OBJECTIVES AND ACTIVITIES

The objects of the charity for the public benefit are set out in the CIO Constitution:

- To advance in life and help young people (under the age of 25) through the provision of facilities for horse riding, carriage driving and other amateur equestrian sports in the interests of social welfare with the object of improving the conditions of life.
- To relieve the needs of disabled people through the provision of facilities for horse riding, carriage riding and other amateur equestrian sports with the object of improving their conditions of life.
- To advance the education of the public in the subject of horse drawn transport through lectures, demonstrations, events and by the establishment and maintenance of a museum of horse drawn vehicles

We have referred to the guidance contained in the Charity Commissioner's general guidance on public benefit when reviewing our aims and objectives and in planning our future activities.

We welcome anyone who can benefit from the resources on offer regardless of personal background, faith, gender, age, financial means or personal circumstances.

#### ACHIEVEMENTS AND PERFORMANCE

This year has been another busy year for the Training Trust. The Trust has again enthralled visitors and regular visitors using the facilities for their own training and improvement with a tour of the museum and on occasion included a tour of the carriage collection.

There has been an increase in the number of tour days. Of note was the annual visit by the Charity Somerset and Sight in August which involved a museum tour followed by a drive around the parkland with a carriage and pair.

September saw a visit from the West Country RDA groups to celebrate their 50 years as a charity. Nearly 50 guests enjoyed an historical museum tour followed by a demonstration training a young horse.

The Trust continues to support young and disabled drivers by sponsoring classes at the British Driving Society annual show at Windsor Park and various other shows around the country.

**THE FENIX TRAINING TRUST**

**REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024 (Contd.)**

**ACHIEVEMENTS AND PERFORMANCE (Contd.)**

We continue to receive donations and numerous telephone enquiries and requests for advice and assistance.

**FINANCIAL REVIEW**

Receipts in the year to 31 December 2023 were £ 1050  
and expenditure of £ 3904.61 , leaving £ 8001.06 in the bank

During the year the annual rent for the premises of £2,200 was paid to Fenix Carriages.  
Fenix Carriages is a business partnership between one of the trustees ( Mrs J Broadbent) and her husband.

approved by the trustees on ..... October 2025 and signed on its behalf by:

.....  
Ian Yule  
(Chairman)

THE FENIX TRAINING TRUST

RECEIPTS AND PAYMENTS ACCOUNT FOR THE YEAR ENDED 31 DECEMBER 2024

	Unrestricted funds	Restricted funds	Total Funds 2024	Total Funds 2023
<b>RECEIPTS</b>				
Voluntary Income:				
Grants & Donations	-	-	-	3,200
Gift Aid Tax recovered		-	-	
Lectures and Museum Tours		-	-	
Events and Sponsorship	1,050	-	1,050	1,955
MDDC COVID-19 Grant	-	-	-	
Use of Facilities	-	-	-	
<b>TOTAL RECEIPTS</b>	<b>1,050</b>	<b>-</b>	<b>1,050</b>	<b>5,155</b>
<b>PAYMENTS</b>				
Rent	2,200	-	2,200	2,200
Rates	156	-	156	146
Accountancy Fees	799	-	799	656
Donations & Sponsorship	-	-	-	1,900
Defibrillator		-	-	-
Event and tour costs	750	-	750	50
Website Hosting		-	-	
Secretarial and meeting venue costs		-	-	
Trustee Travel Expenses		-	-	
<b>TOTAL PAYMENTS</b>	<b>3,905</b>	<b>-</b>	<b>3,905</b>	<b>4,952</b>
Excess of Receipts over Payments	(2,855)	-	(2,855)	203
Cash funds Brought Forward	10,856	-	10,856	10,653
<b>Cash Funds Carried Forward</b>	<b>8,001</b>	<b>-</b>	<b>8,001</b>	<b>10,856</b>

**THE FENIX TRAINING TRUST**  
**STATEMENT OF ASSETS AND LILBILITIES**  
**AS AT 31 DECEMBER 2024**

	2024	2023
	£	£
<b>ASSETS</b>		
Other Assets	1,206	1206
<b>CASH FUNDS</b>		
Bank current account	8,001	10,856
<b>OTHER MONETARY ASSETS</b>		
Income Tax Recoverable	-	-

**LIABILITIES**

A 5 year lease was entered into at an annual rent of £2,000 from 1st May 2013. The first rent was paid in March 2014 and rent continues to be paid for 2023. at £2,200 per annum.

**LEASEHOLD IMPROVEMENTS**

Toilet Facilities

Approved by the Trustees on ..... October 2025 and signed on their behalf by:

Ian Yule  
(Chairman)

**THE FENIX TRAINING TRUST**

England & Wales - Charity number 1151830

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# Accounts

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**THE FENIX TRAINING TRUST  
(A CHARITABLE INCORPORATED ORGANISATION)**

**REPORT AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 DECEMBER 2023**

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### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2023

The Trustees are pleased to present their report, together with the financial statements of the charity, for the year ended 31 December 2023.

#### REFERENCE AND ADMINISTRATIVE DETAILS

<b>Charity number</b>	1151830
<b>Principal Address</b>	Higher Hill Farm Clayhidon Cullompton Devon EX15 3TW
<b>Bankers</b>	Barclays Bank 26 Fore Street Wellington Somerset TA21 8AN

#### Trustees

The trustees serving during the year and since the year end were as follows:

- Ian Yule (chair)
- Joanna Broadbent (Secretary)
- Andrew Walker
- Lynne Wright

#### STRUTURE, GOVERNANCE AND MANAGEMENT

##### Governing document

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##### Appointment of Trustees

As set out in the constitution, there must be at least three charity trustees and not more than twelve. The trustees are also the members of the CIO and have no liability to contribute to its assets if it is wound up and no personal responsibility for settling its debts and liabilities. Apart from the initial trustees, every trustee so appointed for a term of three years although they can offer themselves for re-appointment and retire by notifying the CIO in writing. Appointment is by a resolution passed at a properly convened meeting of the CIO trustees.

## THE FENIX TRAINING TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2023 (Contd.)

#### Organisation

The board of trustees administers the charity and meets at least twice a year.

In planning our activities, we kept in mind the Charity Commissioner's guidance on public benefit. We have continued to communicate on a regular basis by phone and meet as required.

#### Risk Management

The trustees conducted a review of the major risks which the charity was exposed and continue, where appropriate, have systems or procedures to mitigate the risks the charity faces. Procedures are in place to ensure compliance with health and safety of staff, volunteers, clients and visitors to the centre.

#### OBJECTIVES AND ACTIVITIES

The objects of the charity for the public benefit are set out in the CIO Constitution:

- To advance in life and help young people (under the age of 25) through the provision of facilities for horse riding, carriage driving and other amateur equestrian sports in the interests of social welfare with the object of improving the conditions of life.
- To relieve the needs of disabled people through the provision of facilities for horse riding, carriage riding and other amateur equestrian sports with the object of improving their conditions of life.
- To advance the education of the public in the subject of horse drawn transport through lectures, demonstrations, events and by the establishment and maintenance of a museum of horse drawn vehicles

We have referred to the guidance contained in the Charity Commissioner's general guidance on public benefit when reviewing our aims and objectives and in planning our future activities.

We welcome anyone who can benefit from the resources on offer regardless of personal background, faith, gender, age, financial means or personal circumstances.

#### ACHIEVEMENTS AND PERFORMANCE

This year has been another productive year. The unique museum which is the main feature of the Trust has again enthralled visitors on arranged visits as well as those who visit the facilities on a more regular basis. The collection continues to grow as carriages are restored and housed in the museum. There have been visits this year from two London Livery companies both of whom enjoyed an educational day. A new event for the Trust was the annual presentation by the Coachmakers Company to young students interested in the arts and crafts of "four in hand coaching" was held at the Trust which included a two day instructional course.

**THE FENIX TRAINING TRUST**

**REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2023 (Contd.)**

**ACHIEVEMENTS AND PERFORMANCE (Contd.)**

We continue to receive donations and numerous telephone enquiries and requests for advice and assistance.

Continued networking with the Somerset Sight charity and the Fenix Training Trust has meant that the relationship continues to flourish. However, this year due to their internal reorganisation and a clash of dates meant they were unable to visit this year.

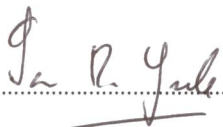
A new event for the Trust was a visit from The Exeter Flotilla and Royal Navy Officers who arranged a very successful visit and the Trust received a donation.

**FINANCIAL REVIEW**

Receipts in the year to 31 December 2023 were £ 5505  
and expenditure of £ 5302.31 , leaving £ 10855.67 in the bank

During the year the annual rent for the premises of £2,200 was paid to Fenix Carriages. Fenix Carriages is a business partnership between one of the trustees ( Mrs J Broadbent) and her husband.

approved by the trustees on <sup>24<sup>th</sup></sup> October 2024 and signed on its behalf by:



.....

Ian Yule  
(Chairman)

THE FENIX TRAINING TRUST

RECEIPTS AND PAYMENTS ACCOUNT FOR THE YEAR ENDED 31 DECEMBER 2023

	Unrestricted funds	Restricted funds	Total Funds 2023	Total Funds 2022
<b>RECEIPTS</b>				
Voluntary Income:				
Grants & Donations	3,200	-	3,200	3,200
Gift Aid Tax recovered		-	-	
Lectures and Museum Tours		-	-	
Events and Sponsorship	1,955	-	1,955	50
MDDC COVID-19 Grant	-	-	-	
Use of Facilities	-	-	-	
<b>TOTAL RECEIPTS</b>	<b>5,155</b>	<b>-</b>	<b>5,155</b>	<b>3,250</b>
<b>PAYMENTS</b>				
Rent	2,200	-	2,200	2,200
Rates	146	-	146	138
Accountancy Fees	656	-	656	576
Donations & Sponsorship	1,900	-	1,900	1,650
Defibrillator		-	-	1,206
Event and tour costs	50	-	50	-
Website Hosting		-	-	
Secretarial and meeting venue costs		-	-	
Trustee Travel Expenses		-	-	
<b>TOTAL PAYMENTS</b>	<b>4,952</b>	<b>-</b>	<b>4,952</b>	<b>5,770</b>
Excess of Receipts over Payments	203	-	203	(2,520)
Cash funds Brought Forward	10,653	-	10,653	13,173
<b>Cash Funds Carried Forward</b>	<b>10,856</b>	<b>-</b>	<b>10,856</b>	<b>10,653</b>

**THE FENIX TRAINING TRUST**  
**STATEMENT OF ASSETS AND LIABILITIES**  
**AS AT 31 DECEMBER 2023**

	2023 £	2022 £
<b>ASSETS</b>		
Other Assets	1,206	1206
<b>CASH FUNDS</b>		
Bank current account	10,856	10,653
<b>OTHER MONETARY ASSETS</b>		
Income Tax Recoverable	-	-

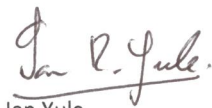
**LIABILITIES**

A 5 year lease was entered into at an annual rent of £2,000 from 1st May 2013. The first rent was paid in March 2014 and rent continues to be paid for 2023. at £2,200 per annum.

**LEASEHOLD IMPROVEMENTS**

Toilet Facilities

Approved by the Trustees on <sup>24<sup>th</sup></sup> 4<sup>th</sup> October 2024 and signed on their behalf by:



Ian Yule  
(Chairman)

**THE FENIX TRAINING TRUST**

England & Wales - Charity number 1151830

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# Accounts

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**THE FENIX TRAINING TRUST  
(A CHARITABLE INCORPORATED ORGANISATION)**

**REPORT AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 DECEMBER 2022**

**THE FENIX TRAINING TRUST  
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**REPORT AND FINANCIAL STATEMENTS  
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<b>Principal Address</b>	Higher Hill Farm Clayhidon Cullompton Devon EX15 3TW
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#### Trustees

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Ian Yule (chair)  
Joanna Broadbent (Secretary)  
Andrew Walker  
Lynne Wright

#### STRUTURE, GOVERNANCE AND MANAGEMENT

##### Governing document

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##### Appointment of Trustees

As set out in the constitution, there must be at least three charity trustees and not more than twelve. The trustees are also the members of the CIO and have no liability to contribute to its assets if it is wound up and no personal responsibility for settling its debts and liabilities. Apart from the initial trustees, every trustee so appointed for a term of three years although they can offer themselves for re-appointment and retire by notifying the CIO in writing. Appointment is by a resolution passed at a properly convened meeting of the CIO trustees.

## THE FENIX TRAINING TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2022 (Contd.)

#### Organisation

The board of trustees administers the charity and meets at least twice a year. During the COVID-19 pandemic any communications were carried out by telephone as not all trustees had the ability to join on line meetings. In planning our activities, we kept in mind the Charity Commissioner's guidance on public benefit. We have continued to communicate by phone and will arrange a once a year meeting.

#### Risk Management

The trustees conducted a review of the major risks which the charity was exposed and continue, where appropriate, systems or procedures to mitigate the risks the charity faces.

Procedures are in place to ensure compliance with health and safety of staff, volunteers, clients and visitors to the centre.

#### OBJECTIVES AND ACTIVITIES

The objects of the charity for the public benefit are set out in the CIO Constitution:

- To advance in life and help young people (under the age of 25) through the provision of facilities for horse riding, carriage driving and other amateur equestrian sports in the interests of social welfare with the object of improving the conditions of life.
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- To advance the education of the public in the subject of horse drawn transport through lectures, demonstrations, events and by the establishment and maintenance of a museum of horse drawn vehicles

We have referred to the guidance contained in the Charity Commissioner's general guidance on public benefit when reviewing our aims and objectives and in planning our future activities.

We welcome anyone who can benefit from the resources on offer regardless of personal background, faith, gender, age, financial means or personal circumstances.

#### ACHIEVEMENTS AND PERFORMANCE

This year has seen visits return to more normal levels with visits from amongst others the Worshipful Company of Coach Makers. This year we also saw a restart of the Disabled Teaching in earnest and an evening talk was also organised which was extremely well attended.

## THE FENIX TRAINING TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2022 (Contd.)

#### ACHIEVEMENTS AND PERFORMANCE (Contd.)

We continue to receive donations.

Continued networking with the Somerset Sight charity and the Fenix Training Trust has meant that visits and rides and educational talks to the blind and partially sighted of all ages continues to flourish. They have greatly enjoyed seeing and being with the carriages both in the museum and in operation.

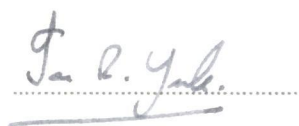
There are now plans to organise evening visits and junior training days as these are felt to be in strong demand.

#### FINANCIAL REVIEW

Receipts in the year to 31 December 2022 were £3,250.  
expenditure of £5,770 leaving £10,652 in the bank account.

During the year the annual rent for the premises of £2,200 was paid to Fenix Carriages.  
Fenix Carriages is a business partnership between one of the trustees ( Mrs J Broadbent) and her husband.

approved by the trustees on 31st October 2023 and signed on its behalf by:

A handwritten signature in cursive script, appearing to read 'Ian Yule', is written over a horizontal dotted line. Below the dotted line is a solid horizontal line.

Ian Yule  
(Chairman)

THE FENIX TRAINING TRUST

RECEIPTS AND PAYMENTS ACCOUNT FOR THE YEAR ENDED 31 DECEMBER 2022

	Unrestricted funds	Restricted funds	Total Funds 2022	Total Funds 2021
<b>RECEIPTS</b>				
Voluntary Income:				
Grants & Donations	3,200	-	3,200	
Gift Aid Tax recovered		-	-	1,610
Lectures and Museum Tours		-	-	
Events and Sponsorship	50	-	50	
MDDC COVID-19 Grant	-	-	-	
Use of Facilities	-	-	-	
<b>TOTAL RECEIPTS</b>	<b>3,250</b>	<b>-</b>	<b>3,250</b>	<b>1,610</b>
<b>PAYMENTS</b>				
Rent	2,200	-	2,200	2,200
Rates	138	-	138	138
Accountancy Fees	576	-	576	540
Donations & Sponsorship	1,650	-	1,650	
Defibrillator	1,206	-	1,206	-
Event and tour costs		-	-	-
Website Hosting		-	-	
Secretarial and meeting venue costs		-	-	
Trustee Travel Expenses		-	-	560
<b>TOTAL PAYMENTS</b>	<b>5,770</b>	<b>-</b>	<b>5,770</b>	<b>3,438</b>
Excess of Receipts over Payments	<b>(2,520)</b>	<b>-</b>	<b>(2,520)</b>	<b>(1,828)</b>
Cash funds Brought Forward	13,173	-	13,173	15,001
<b>Cash Funds Carried Forward</b>	<b>10,653</b>	<b>-</b>	<b>10,653</b>	<b>13,173</b>

**THE FENIX TRAINING TRUST**  
**STATEMENT OF ASSETS AND LIABILITIES**  
**AS AT 31 DECEMBER 2022**

	2022	2021
	£	£
<b>ASSETS</b>		
Other Assets	1,206	
<b>CASH FUNDS</b>		
Bank current account	10,653	13,173
<b>OTHER MONETARY ASSETS</b>		
Income Tax Recoverable	-	1,600

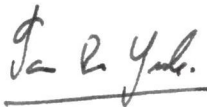
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**LEASEHOLD IMPROVEMENTS**

Toilet Facilities

Approved by the Trustees on 31st October 2023 and signed on their behalf by:



Ian Yule  
(Chairman)

**THE FENIX TRAINING TRUST**

England & Wales - Charity number 1151830

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# Accounts

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**REPORT AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 DECEMBER 2021**

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The Fenix Training Trust is a Charitable Incorporated Organisation (CIO) governed by its Constitution adopted at its inaugural meeting on 9th May 2013 following confirmation by the Charity commission of its registered charity status on 29th April 2013.

##### Appointment of Trustees

As set out in the constitution, there must be at least three charity trustees and not more than twelve. The trustees are also the members of the CIO and have no liability to contribute to its assets if it is wound up and no personal responsibility for settling its debts and liabilities. Apart from the initial trustees, every trustee so appointed for a term of three years although they can offer themselves for re-appointment and retire by notifying the CIO in writing. Appointment is by a resolution passed at a properly convened meeting of the CIO trustees.

## **THE FENIX TRAINING TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2021 (Contd.)**

#### **Organisation**

The board of trustees administers the charity and meets at least twice a year. During the COVID-19 pandemic any communications were carried out by telephone as not all trustees had the ability to join on line meetings. In planning our activities, we kept in mind the Charity Commissioner's guidance on public benefit. We have continued to communicate by phone and will arrange a once a year meeting.

#### **Risk Management**

The trustees conducted a review of the major risks which the charity was exposed and continue, where appropriate, systems or procedures to mitigate the risks the charity faces. Procedures are in place to ensure compliance with health and safety of staff, volunteers, clients and visitors to the centre.

#### **OBJECTIVES AND ACTIVITIES**

The objects of the charity for the public benefit are set out in the CIO Constitution:

- To advance in life and help young people (under the age of 25) through the provision of facilities for horse riding, carriage driving and other amateur equestrian sports in the interests of social welfare with the object of improving the conditions of life.
- To relieve the needs of disabled people through the provision of facilities for horse riding, carriage riding and other amateur equestrian sports with the object of improving their conditions of life.
- To advance the education of the public in the subject of horse drawn transport through lectures, demonstrations, events and by the establishment and maintenance of a museum of horse drawn vehicles

We have referred to the guidance contained in the Charity Commissioner's general guidance on public benefit when reviewing our aims and objectives and in planning our future activities.

We welcome anyone who can benefit from the resources on offer regardless of personal background, faith, gender, age, financial means or personal circumstances.

#### **ACHIEVEMENTS AND PERFORMANCE**

The COVID-19 pandemic halted all the activities usually associated with The Fenix Training Trust. Unfortunately, we were not able to allow any visits or let anybody use the facilities during the period of lockdown.

We are now beginning to find that customers are gaining confidence and making enquiries to visit to undertake the various activities.

**THE FENIX TRAINING TRUST**

**REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2021 (Contd.)**

**ACHIEVEMENTS AND PERFORMANCE (Contd.)**

We continue to receive some donations.

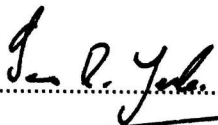
A positive outcome from last year was continued networking behind the scenes which resulted in contact with the Somerset Sight charity and an ongoing relationship with the Fenix Training Trust allowing visits (after lockdown was lifted), and giving rides and educational talks to blind and partially blind individuals of all ages. They have greatly enjoyed seeing and being with the carriages both in the museum and in operation. As there has not been any activity in the last twelve months some work will have to be undertaken to rekindle the charity's aims and objectives.

**FINANCIAL REVIEW**

Receipts in the year to 31 December 2021 were £1,600, plus a Repayment interest of £10.31 with expenditure of £3,438 leaving £13,173 in the bank account.

During the year the annual rent for the premises of £2,200 was paid to Fenix Carriages. Fenix Carriages is a business partnership between one of the trustees ( Mrs J Broadbent) and her husband.

approved by the trustees on ~~24~~<sup>24</sup> October 2022 and signed on its behalf by:

  
.....

Ian Yule  
(Chairman)

**THE FENIX TRAINING TRUST**

**RECEIPTS AND PAYMENTS ACCOUNT FOR THE YEAR ENDED 31 DECEMBER 2021**

	Unrestricted funds	Restricted funds	Total Funds 2022	Last Year 2021
<b>RECEIPTS</b>				
Voluntary Income:				
Grants & Donations	-	-	-	3,728
Gift Aid Tax recovered	1,610	-	1,610	
Lectures and Museum Tours		-	-	
Events and Sponsorship	-	-	-	
MDDC COVID-19 Grant	-	-	-	10,000
Use of Facilities	-	-	-	
<b>TOTAL RECEIPTS</b>	<u>1,610</u>	<u>-</u>	<u>1,610</u>	<u>13,728</u>
<b>PAYMENTS</b>				
Rent	2,200	-	2,200	4,000
Council Tax	138	-	138	138
Accountancy Fees	540	-	540	768
Arena re-surface costs		-	-	3,000
Grants/Bursary		-	-	-
Event and tour costs		-	-	-
Website Hosting		-	-	114
Secretarial and meeting venue costs		-	-	980
Trustee Travel Expenses	560	-	560	810
<b>TOTAL PAYMENTS</b>	<u>3,438</u>	<u>-</u>	<u>3,438</u>	<u>9,810</u>
Excess of Receipts over Payments	<b>(1,828)</b>	-	<b>(1,828)</b>	3,918
Cash funds Brought Forward	15,001	-	15,001	11,083
<b>Cash Funds Carried Forward</b>	<u><u>13,173</u></u>	<u><u>-</u></u>	<u><u>13,173</u></u>	<u><u>15,001</u></u>

THE FENIX TRAINING TRUST

STATEMENT OF ASSETS AND LIABILITIES  
AS AT 31 DECEMBER 2021

	2021 £	2021 £
<b>CASH FUNDS</b>		
Bank current account	13,173	15,001
<b>OTHER MONETARY ASSETS</b>		
Income Tax Recoverable	-	1,600


**LIABILITIES**

A 5 year lease was entered into at an annual rent of £2,000 from 1st May 2013.  
The first rent was paid in March 2014 and rent continues to be paid for 2019, 2020 and 2021 at £2,000 per annum and £2,200 for 2021 and 2022.

**LEASEHOLD IMPROVEMENTS**

Toilet Facilities

Approved by the Trustees on 24/12/2022 and signed on their behalf by:

  
Jan Yule  
(Chairman)

**THE FENIX TRAINING TRUST**

England & Wales - Charity number 1151830

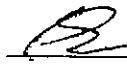
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# Accounts

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## BOOKING IN FORM

Client: Fenix Training Trust  
 Client code: 05B013  
 Year end: 31-Dec-20  
 Prepared by: WJT  
 Date records received: 27/09/2021

Reviewed by: 

Account no		<u>Records received</u>		Details	Complete
23846458	Bank statements from	<u>22/11/2013</u>	to	<u>25/06/2021</u> Community a/c	<input checked="" type="checkbox"/>
	Bank statements from	_____	to	_____	<input type="checkbox"/>
	Bank statements from	_____	to	_____	<input type="checkbox"/>
	Bank statements from	_____	to	_____	<input type="checkbox"/>
	loan statements from	_____	to	_____	<input type="checkbox"/>
	credit card statements	_____	to	_____	<input type="checkbox"/>

- |                       |                                     |                        |                                     |           |                          |
|-----------------------|-------------------------------------|------------------------|-------------------------------------|-----------|--------------------------|
| Stock Valuation sheet | <input type="checkbox"/>            | VAT returns            | <input type="checkbox"/>            | P60       | <input type="checkbox"/> |
| Taking receipts       | <input checked="" type="checkbox"/> | Mileage/expense claims | <input type="checkbox"/>            | pension   | <input type="checkbox"/> |
| Post Y/E records      | <input type="checkbox"/>            | Cheque book stub book  | <input checked="" type="checkbox"/> | Donations | <input type="checkbox"/> |
| Purchase invoices     | <input checked="" type="checkbox"/> | Paying in slips        | <input type="checkbox"/>            | Dividends | <input type="checkbox"/> |
| Shareholder register  | <input type="checkbox"/>            | Cashbook               | <input checked="" type="checkbox"/> |           | <input type="checkbox"/> |
| Software used         |                                     | Folder of notes        | <input checked="" type="checkbox"/> |           | <input type="checkbox"/> |

Other Items

Tax Letter - filled out

Items missing

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

On Job Board?  On Records Board?  Records location? PHB   
 Lentells Jute bag