



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day	Month	Year		Day	Month	Year
	31	May	2024		30	May	2025

Section A

Reference and administration details

Charity name

The Chaldean Charitable Trust

Other names charity is known by

Registered charity number (if any)

1153713

Charity's principal address

Cardane Court

Bromley Lane

Much Hadham, Hertfordshire

Postcode

SG10 6HU

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	Mr Gordon Morrison			
2	Mrs Mary Scott Morrison			
3	Mr David Ian Alexander Morrison			
4	Mrs Morag Elisabeth Broom			
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Trust Deed
How the charity is constituted (eg. trust, association, company)	Trust
Trustee selection methods (eg. appointed by, elected by)	The power to appoint new trustees vests in the trustees from time to time.

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

The objects of the charity are specifically restricted to such objects and purposes in any part of the world as are exclusively charitable in accordance with the laws of England and Wales.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The Charity makes grants to other registered charities, particularly those which work with and for the benefit of children, but also in furtherance of the other charitable purposes within the charity's objects as the trustees in their discretion determine.

During the year the trustees have complied with their duty to have due regard to the Charity Commission's public benefit guidance when exercising any powers or duties to which the guidance is relevant.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

During the year the charity received income from its investments totalling £137,761, including £128,000 sale proceeds.

During the year the trustees made grants totalling £72,120 to Helping Herts. Twenty two further grants totalling £29,300 were made to various other charities.

Section E

Financial review

Brief statement of the charity's policy on reserves

As stated in section C above the charity, in the main, makes periodic grants to other registered charities. The charity's main source of income is from its investment portfolio which includes equities and cash. The charity has very little by way of annual expenses or fixed costs and for this reason the actual level of reserves required is minimal and the value of the investment portfolio is much greater than the reserve funds required to run the charity on a day to day basis.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Section F

Other optional information

Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)



Full name(s)

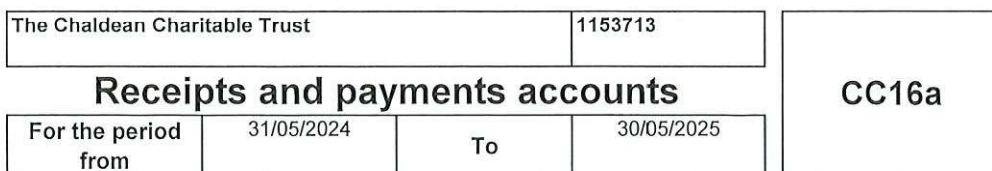
Gordon Morrison

Position (eg Secretary, Chair, etc)

Trustee


Date

11/11/2025



C Hoare & Co	Cazenove		Total funds	Last year
to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
305	12		317	442
-	9,761		9,761	12,685
-	-		-	-
-			-	-
			-	-
			-	-
			-	-
			-	-
305	9,773	-	10,078	13,126
-	128,000	-	128,000	155,912
-	-	-	-	-
-	128,000	-	128,000	155,912
305	137,773	-	138,078	169,038
72,120	-		72,120	133,786
-			-	25,000
29,300			29,300	22,500
-	1,313		1,313	1,408
406	-		406	377
-			-	-
			-	-
101,825	1,313	-	103,139	183,070
-			-	-
-		-	-	-
-	-	-	-	-
101,825	1,313	-	103,139	183,070
-	136,459	-	34,939	14,032
141,075	-	-	-	-
13,090	6,894	-	19,984	34,016
52,644	2,279	-	54,923	19,984

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	C Hoare & Co	52,644	-	-
	Cazenove Income Account	1,864	-	-
	Cazenove Capital Account	415	-	-
	Total cash funds	54,923	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	Agreement Error	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	Cazenove Capital Management	Unrestricted	-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
	Independent Examination	Unrestricted	-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees		Signature	Print Name	Date of approval
			Gordon Morrison	11/11/2025



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
Chaldean Charitable Trust

**On accounts for the year
ended**

30 May 2025

**Charity no
(if any)**

115713

Set out on pages

3 and 4.

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30/05/2025.

**Responsibilities and
basis of report**

As the charity trustees of the Trust, 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 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 examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed:

Date:

11/11/2025

Name:

Michael Pettifer

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

Address:

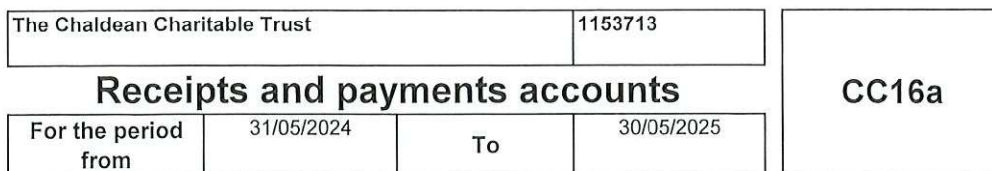
Parsonage House, Wicken Road, Newport, Saffron Walden, CB11 3QG

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 brief details of any items that the examiner wishes to disclose.

[illegible]

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	C Hoare & Co	52,644	-	-
	Cazenove Income Account	1,864	-	-
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	Total cash funds	54,923	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	Agreement Error	OK


	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	Cazenove Capital Management	Unrestricted	-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities	Independent Examination	Unrestricted	-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Gordon Morrison	11/11/2025