

# THE ROYAL WESSEX YEOMANRY ASSOCIATION

England & Wales · Charity number 1162030

## Details

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Other names	RWXY ASSOCIATION
Status	Registered
Legal form	CIO
Registered	2015-06-05
Register	<a href="#">View on the Charity Commission register</a>

## Contact

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Address	Royal Wessex Yeomanry Association Rao RwxY Allenby Barracks Bovington Wareham BH20 6JA
Phone	01929403776
Email	<a href="mailto:rwxy-rhq-mainpostbox@mod.uk">rwxy-rhq-mainpostbox@mod.uk</a>

## Activities

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**Objects:** (1) TO PROMOTE THE EFFICIENCY OF THE ROYAL WESSEX YEOMANRY PERSONNEL BY ANY CHARITABLE MEANS, INCLUDING BUT NOT LIMITED TO, FOSTERING ESPRIT DE CORPS AND MAINTAINING CONTACT BETWEEN PAST AND PRESENT MEMBERS, INCLUDING ANTECEDENT REGIMENTS.(2) TO RELIEVE EITHER GENERALLY OR INDIVIDUALLY PERSONS WHO ARE SERVING OR WHO HAVE SERVED IN THE ROYAL WESSEX YEOMANRY, OR DEPENDENTS OF SUCH PERSONS, WHO ARE IN CONDITIONS OF SUFFERING, NEED, HARDSHIP OR DISTRESS.

**Activities:** RWxY Assn promotes the efficiency of RWxY personnel by any charitable means, including fostering esprit de corps & maintaining contact between past & present members, including antecedent regiments. It also relieves either generally or individually persons who are serving or who have served in RWxY, or the dependents of such persons, who are in conditions of suffering, need, hardship or distress.

## Classification

- **How:** Makes Grants To Individuals, Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body
- **What:** Armed Forces/emergency Service Efficiency
- **Who:** Children/young People, Elderly/old People, People With Disabilities, People Of A Particular Ethnic Or Racial Origin

## Geography

- Throughout England And Wales

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£9,281	£6,315	-	-
2024-03-31	£50	£541	-	-
2023-03-31	£223	£2,178	-	-
2022-03-31	£241	£0	-	-
2021-03-31	£3,015	£1,685	-	-

## Trustees

Name	Role	Appointed
<b>Lt Col Anthony Edward Sharman VR</b>	Chair	2019-04-01
Capt Emma-Louise Walsh VR		2025-03-31
Capt James Richard Martin VR		2022-05-01
Capt Robert Kennedy		2021-03-01
Capt Wayne Evan Price		2017-05-01
Maj Andrew James McDowall		2025-03-31

**THE ROYAL WESSEX YEOMANRY ASSOCIATION**

England & Wales - Charity number 1162030

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# Accounts

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## Trustees' Annual Report for the period

From 1 April 2024 To 31 March 2025

Charity name: The Royal Wessex Yeomanry Association

Charity registration number: 1162030

### Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>To promote the efficiency of Royal Wessex Yeomanry personnel by any charitable means, including fostering <i>esprit de corps</i> and maintaining contact between past and present members, including antecedent regiments.</p> <p>To relieve either generally or individually persons who are serving or who have served in the Royal Wessex Yeomanry, or their dependents, who are in suffering, need, hardship or distress.</p>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<p>During this period, the charity has supported members of the Royal Wessex Yeomanry with the costs of Adventurous Training, provided funding to the regiment's PRI to support routine spending on social events, prizes and other beneficial expenditure not covered by the public purse.</p> <p>The charity also provided a buffet lunch for serving and former members of the regiment attending the annual Cavalry Memorial Parade in London.</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<p>The trustees have had regard to the Charity Commission's guidance on public benefit.</p>

#### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<p>Grants are made on an ad-hoc basis, with applications made through the regimental headquarters or via squadron representatives using an electronic form, which is then circulated to the trustees for an electronic vote, following any discussion required.</p>

		<p>Regular grants are provided to the PRI, but only based on demand, given the tight restrictions placed by the MoD on the use of Non-Public Funds.</p> <p>Trustees make grants based on affordability to the charity and with regard to the charity's objects.</p>
Policy on social investment including program related investment	Para 1.38	N/A
Contribution made by volunteers	Para 1.38	N/A
Other		N/A

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>This has been a very satisfactory period for the charity. After a period in which income dwindled and activity, as a result became unaffordable, income has increased significantly, along with improving awareness among the charity's beneficiaries.</p> <p>By demonstrating our ability to financially support events and activity outside those funded by the public purse, the value of the charity has become much more clear to serving members of the regiment, who are increasingly willing to approach the trustees with bids and applications. The resulting improvements in <i>esprit de corps</i> have made a marked impact on attendance and retention, promoting the efficiency of the Royal Wessex Yeomanry.</p>

### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	N/A
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Performance of fundraising activities against objectives set	Para 1.41	N/A
Investment performance against objectives	Para 1.41	N/A
Other		N/A

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<p>The charity's financial position is much improved at the end of this period, with income up over 200% on the previous high of the last 5 years. Expenditure is up by a similar factor, but the account balance is still up by half, providing roughly one year's budgeted spend in hand.</p> <p>The trustees do not expect a further significant increase in income in the future, and will take care to prioritise new spending based on affordability and impact.</p>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	
Amount of reserves held	Para 1.22	Reserves are not held
Reasons for holding zero reserves	Para 1.22	The charity has no fixed costs or responsibilities beyond the charitable objects.
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	N/A

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	The charity's income comes largely from members of the Royal Wessex Yeomanry under the voluntary "One Day's Pay" charitable giving scheme. In addition to raising funds, this also provides an opportunity to explain the charity's objects to those who are its beneficiaries.
Investment policy and objectives including any social investment policy adopted	Para 1.46	N/A
A description of the principal risks facing the charity	Para 1.46	<p>The key risk facing the charity is the availability of volunteers to act as trustees and to maintain momentum in both fundraising and looking for opportunities to further the key objectives.</p> <p>This risk has largely been resolved in the last year by separating the role of Chair of Trustees from that of Commanding Officer. This creates a clearer division between the serving regiment and the charity as an independent entity, removes some of the admin burden from a hard-pressed reservist CO and allows for better continuity.</p>
Other		N/A

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charitable Incorporated Organisation
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Appointment by existing trustees

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	Trustees receive an appropriate induction on appointment. This includes an overview of the charity's purposes, governance arrangements, key policies, and current activities. Ongoing training and briefings are provided as required to ensure trustees remain aware of their legal duties, responsibilities, and the operational context in which the charity operates.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The charity's membership are its trustees, with a nominated Chair and Secretary/Treasurer managing routine business. There are no subsidiaries or wider network.
Relationship with any related parties	Para 1.51	The charity maintains a close relationship with the Royal Wessex Yeomanry, for the administration of fundraising through the "One Day's Pay" scheme and as the recipient of grants to the regimental PRI fund.
Other		N/A

### Reference and Administrative details

Charity name	The Royal Wessex Yeomanry Association
Other name the charity uses	
Registered charity number	1162030
Charity's principal address	Allenby Barracks, Bovington, Dorset BH20 6JA

**Names of the charity trustees who manage the charity**

	<b>Trustee name</b>	<b>Office (if any)</b>	<b>Dates acted if not for whole year</b>	<b>Name of person (or body) entitled to appoint trustee (if any)</b>
1	Anthony Sharman	Chair		
2	James Martin	Secretary		
3	Emma Walsh	Dorset Rep		
4	Robert Kennedy	Wilts Rep		
5	Wayne Price	Glocs Rep		
6	Andrew McDowall	Devon Rep		
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## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)	<i>A E Shorman</i>	
Full name(s)	A E SHARMAN	
Position (eg Secretary, Chair, etc)	CHAIR	
Date	30 Jan 2026	

## Section B Balance sheet

		Unrestricted funds	Restricted income funds	Endowment funds	Total this year	Total last year
	Note	£	£	£	£	£
		F01	F02	F03	F04	F05
<b>Fixed assets</b>						
Tangible assets (Note 9)	B01	-	-	-	-	-
	B02	-	-	-	-	-
Investments (Note 10)	B03	-	-	-	-	-
<b>Total fixed assets</b>	B04	-	-	-	-	-
<b>Current assets</b>						
Stock and work in progress	B05	-	-	-	-	-
Debtors (Note 11)	B06	-	-	-	-	-
(Short term) investments	B07	-	-	-	-	-
Cash at bank and in hand	B08	-	-	-	-	-
<b>Total current assets</b>	B09	-	-	-	-	-
<b>Creditors: amounts falling due within one year</b> (Note 12)	B10	-	-	-	-	-
<b>Net current assets/(liabilities)</b>	B11	-	-	-	-	-
<b>Total assets less current liabilities</b>	B12	-	-	-	-	-
<b>Creditors: amounts falling due after one year</b> (Note 12)	B13	-	-	-	-	-
<b>Provisions for liabilities and charges</b>	B14	-	-	-	-	-
<b>Net assets</b>	B15	-	-	-	-	-
<b>Funds of the Charity</b>						
Unrestricted funds	B16	9,098			9,098	-
	B17	-			-	-
Restricted income funds (Note 13)	B18		-		-	-
Endowment funds (Note 13)	B19			-	-	-
<b>Total funds</b>	B20	9,098	-	-	9,098	-

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

Signature	Print Name	Date of approval
<i>A E Sharmarman</i>	A E SHARMAN	30 Jan 26



Charity Name		Charity No (if any)		<b>CC17a</b>
<b>Annual accounts for the period</b>				
Period start date		<b>To</b>	Period end date	

## Section A Statement of financial activities

Recommended categories by activity	Details of own analysis	Note	Restricted			Total this year £	Total last year £
			Unrestricted funds £	income funds £	Endowment funds £		
			F01	F02	F03	F04	F05
<b>Incoming resources (Note 3)</b>							
Incoming resources from generated funds			-	-	-	-	-
Voluntary income		S01	9,281	-	-	9,281	-
Activities for generating funds		S02	-	-	-	-	-
Investment income		S03	-	-	-	-	-
Incoming resources from charitable activities		S04	-	-	-	-	-
Other incoming resources		S05	-	-	-	-	-
<b>Total incoming resources</b>		S06	9,281	-	-	9,281	-
<b>Resources expended (Notes 4-8)</b>							
Costs of Generating Funds			-	-	-	-	-
Costs of generating voluntary income		S07	-	-	-	-	-
Fundraising trading costs		S08	-	-	-	-	-
Investment management costs		S09	-	-	-	-	-
Charitable activities		S10	6,315	-	-	6,315	-
Governance costs		S11	-	-	-	-	-
Other resources expended		S12	-	-	-	-	-
<b>Total resources expended</b>		S13	6,315	-	-	6,315	-
<b>Net incoming/(outgoing) resources before transfers</b>		S14	2,966	-	-	2,966	-
<b>Gross transfers between funds</b>		S15	-	-	-	-	-
<b>Net incoming/(outgoing) resources before other recognised gains/(losses)</b>		S16	2,966	-	-	2,966	-
<b>Other recognised gains/(losses)</b>							
Gains and losses on revaluation of fixed assets for the charity's own use		S17	-	-	-	-	-
Gains and losses on investment assets		S18	-	-	-	-	-
<b>Net movement in funds</b>		S19	2,966	-	-	2,966	-
<b>Total funds brought forward</b>		S20	-	-	-	-	-
<b>Total funds carried forward</b>		S21	2,966	-	-	2,966	-

**THE ROYAL WESSEX YEOMANRY ASSOCIATION**

England & Wales - Charity number 1162030

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# Accounts

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# Trustees' Annual Report for the period

Period start date		Period end date		
<b>From</b>	1 April 2023	<b>To</b>	31 March	2024

## Section A Reference and administration details

**Charity name** The Royal Wessex Yeomanry Association

**Other names charity is known by** RWxY Assn

**Registered charity number (if any)** 1162030

**Charity's principal address**

Allenby Barracks  
 Bovington Camp  
 Wareham  
**Postcode** BH20 6JA

### 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	Anthony SHARMAN	Chairman		
2	Jules Speers			
3	James Martin			
4	Robert Kennedy			
5	Wayne Price			
6	Christopher Hart	Honorary Treasurer		
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### 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)

Constitution 5 Jun 15

How the charity is constituted  
(eg. trust, association, company)

Association

Trustee selection methods  
(eg. appointed by, elected by)

Appointed by Existing Trustees

### 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.

The Trustees named on page 1 have served throughout the year. The appointment of Trustees is governed by the Constitution. None of the Trustees received any remuneration or reimbursement of expenses during the year.

The Trustees actively review the major risk that the Charity faces on a regular basis. The Trustees have reviewed income and expenditure and have maintained control over expenditure.

## Section C Objectives and activities

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

To promote the efficiency of the Royal Wessex Yeomanry personnel by any charitable means, including but not limited to, fostering esprit de corps and maintaining contact between past and present members, including antecedent regiments;

To relieve either generally or individually persons who are serving or who have served in The Royal Wessex Yeomanry, or the dependents of such persons, who are in conditions of suffering, need, hardship or distress.

**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 Trustees have complied with the duty in section 17(5) of the Charities Act 2011 to have due regard to the guidance published by the Charity Commission.

The Charity is able to provide assistance to the persons and their dependants who have served with the above units. This can be in the form of grants of money, paying for services, goods and facilities for them, or making grants of money to other persons or bodies who provide goods, services, etc to those in need.

**Additional details of objectives and activities (Optional information)**

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

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

**Section D**

**Achievements and performance**

**Summary of the main achievements of the charity during the year**

The Trustees consider the performance of the Charity has been very satisfactory seeing that it is the first year in which they have been registered as a Fund.

It has only been at the end of the current accounting period that the Charity has started to receive funds and therefore, so far, has not been in a viable position to support anyone up until now. This will change in the next reporting period, with the aim of the RWxY Assn to be able to provide grants and beneficiaries to those seeking assistance.

Due to being newly formed the membership of the Association is still relatively small, growing the numbers, and the income received from having a larger membership, is seen as a priority to ensure the charity is in a position to support those that it has been set up to look after.

**Brief statement of the charity's policy on reserves**

The constitution does not specify the requirement of a Reserve; therefore all of the income is applied in furthering the RWxY Assn charitable objects and all surplus income has therefore accumulated in an Unrestricted Fund.

**Details of any funds materially in deficit**

N/A

**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.

The Fund's main source of income is through the Service Day's Pay Scheme, with either 100% or 50% of a day's pay being donated to the Charity by the serving community of RWxY.

The Fund does not seek to raise funds direct from the public, instead the Fund solicits support from associated military and charitable organisations.

Regimental and private donations remain an important source of income for the Fund and the Trustees would like to thank all those who have contributed so generously.

**Section F Other optional information**

[Empty box for optional information]

**Section G Declaration**

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

Signed on behalf of the charity's trustees

<b>Signature(s)</b>	Anthony Sharman	Christopher Hart
<b>Full name(s)</b>	Anthony Sharman	Christopher Hart
<b>Position (eg Secretary, Chair, etc)</b>	Chairman	Treasurer
<b>Date</b>	29 <sup>th</sup> January 25	



Charity Name The Royal Wessex Yeomanry Association	No (if any) 1162030
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<b>CC16a</b>
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<b>Receipts and payments accounts</b>				
For the period from	Period start date 1-Apr-23	To	Period end date 31-Mar-24	

## Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Subscriptions	40	10	-	50	115
Donations		-	-		108
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b> (Gross income for AR)	40	10	-	50	223
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total receipts</b>	40	10	-	50	223
<b>A3 Payments</b>					
Grants	541	-	-	541	2,178
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	541	-	-	541	2,178
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total payments</b>	541	-	-	541	2,178
<b>Net of receipts/(payments)</b>	- 501	10	-	- 491	1,955
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	6,132	2,871	-	9,003	7,095
<b>Cash funds this year end</b>	5,631	2,881	-	8,512	5,140

## 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 £
<b>B1 Cash funds</b>	Bank Account	4,906	1,226	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	<b>4,906</b>	<b>1,226</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	Agreement Error	Agreement Error	OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>			-	-
			-	-
			-	-
			-	-
			-	-

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

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>			-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
Christopher Hart	Christopher Hart	1/29/2025
Anthony Sharman	Anthony Sharman	1/29/2025

**THE ROYAL WESSEX YEOMANRY ASSOCIATION**

England & Wales - Charity number 1162030

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# Accounts

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# Trustees' Annual Report for the period

Period start date		Period end date		
<b>From</b>	1 April 2022	<b>To</b>	31 March	2023

## Section A Reference and administration details

<b>Charity name</b>	The Royal Wessex Yeomanry Association			
<b>Other names charity is known by</b>	RWxY Assn			
<b>Registered charity number (if any)</b>	1162030			
<b>Charity's principal address</b>	Allenby Barracks			
	Bovington Camp			
	Wareham			
	<b>Postcode</b>	BH20 6JA		

### 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	Anthony SHARMAN	Chairman		
2	Jules Speers			
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### 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

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(eg. trust deed, constitution)

Constitution 5 Jun 15

How the charity is constituted  
(eg. trust, association, company)

Association

Trustee selection methods  
(eg. appointed by, elected by)

Appointed by Existing Trustees

### 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;
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The Trustees named on page 1 have served throughout the year. The appointment of Trustees is governed by the Constitution. None of the Trustees received any remuneration or reimbursement of expenses during the year.

The Trustees actively review the major risk that the Charity faces on a regular basis. The Trustees have reviewed income and expenditure and have maintained control over expenditure.

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

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**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 Trustees have complied with the duty in section 17(5) of the Charities Act 2011 to have due regard to the guidance published by the Charity Commission.

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**Additional details of objectives and activities (Optional information)**

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

**Section D**

**Achievements and performance**

**Summary of the main achievements of the charity during the year**

The Trustees consider the performance of the Charity has been very satisfactory seeing that it is the first year in which they have been registered as a Fund.

It has only been at the end of the current accounting period that the Charity has started to receive funds and therefore, so far, has not been in a viable position to support anyone up until now. This will change in the next reporting period, with the aim of the RWxY Assn to be able to provide grants and beneficiaries to those seeking assistance.

Due to being newly formed the membership of the Association is still relatively small, growing the numbers, and the income received from having a larger membership, is seen as a priority to ensure the charity is in a position to support those that it has been set up to look after.

**Brief statement of the charity's policy on reserves**

The constitution does not specify the requirement of a Reserve; therefore all of the income is applied in furthering the RWxY Assn charitable objects and all surplus income has therefore accumulated in an Unrestricted Fund.

**Details of any funds materially in deficit**

N/A

**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.

The Fund's main source of income is through the Service Day's Pay Scheme, with either 100% or 50% of a day's pay being donated to the Charity by the serving community of RWxY.

The Fund does not seek to raise funds direct from the public, instead the Fund solicits support from associated military and charitable organisations.

Regimental and private donations remain an important source of income for the Fund and the Trustees would like to thank all those who have contributed so generously.

**Section F Other optional information**

[Empty box for optional information]

**Section G Declaration**

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

Signed on behalf of the charity's trustees

<b>Signature(s)</b>	Anthony Sharman	Christopher Hart
<b>Full name(s)</b>	Anthony Sharman	Christopher Hart
<b>Position (eg Secretary, Chair, etc)</b>	Chairman	Treasurer
<b>Date</b>	January 24	



Charity Name The Royal Wessex Yeomanry Association	No (if any) 1162030
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Receipts and payments accounts			
For the period from	Period start date 1-Apr-22	To	Period end date 31-Mar-23

## Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Subscriptions	96	19	-	115	70
Donations	108	-	-	108	171
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>204</b>	<b>19</b>	<b>-</b>	<b>223</b>	<b>241</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>204</b>	<b>19</b>	<b>-</b>	<b>223</b>	<b>241</b>
<b>A3 Payments</b>					
Grants	2,178	-	-	2,178	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>2,178</b>	<b>-</b>	<b>-</b>	<b>2,178</b>	<b>-</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>2,178</b>	<b>-</b>	<b>-</b>	<b>2,178</b>	<b>-</b>
<b>Net of receipts/(payments)</b>	<b>- 1,974</b>	<b>19</b>	<b>-</b>	<b>- 1,955</b>	<b>241</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>4,224</b>	<b>2,871</b>	<b>-</b>	<b>7,095</b>	<b>6,902</b>
<b>Cash funds this year end</b>	<b>2,250</b>	<b>2,890</b>	<b>-</b>	<b>5,140</b>	<b>7,143</b>

## 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 £
<b>B1 Cash funds</b>	Bank Account	2,250	2,890	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	2,250	2,890	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
<b>B2 Other monetary assets</b>	Details	to nearest £	to nearest £	to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
	Christopher Hart	Christopher Hart	1/29/2024	
	Anthony Sharman	Anthony Sharman	1/29/2024	

**THE ROYAL WESSEX YEOMANRY ASSOCIATION**

England & Wales - Charity number 1162030

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# Accounts

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# Trustees' Annual Report for the period

Period start date				Period end date			
<b>From</b>	1	April	2020	<b>To</b>	31	March	2021

## Section A Reference and administration details

**Charity name** The Royal Wessex Yeomanry Association

**Other names charity is known by** RWxY Assn

**Registered charity number (if any)** 1162030

**Charity's principal address**

Allenby Barracks  
 Bovington Camp  
 Wareham  
**Postcode** BH20 6JA

### 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
1	Charles SPEERS	Chairman (ex-Secretary)		
2	Anthony SHARMAN	Secretary (ex-Member)		
3	Ruthven BURDON-COOPER	Ex-Chairman		
4	John GODFREY	Member		
5	Henry KEMP-GEE	Member		
6	David OLIVER	Member	1 Apr 20 – 28 Feb 21	
7	Wayne PRICE	Member		
8	James MARTIN	Member		
9	Martyn FIELD	Member		
10	Robert KENNEDY	Member	1 Mar 21 – 31 Mar 21	
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
Book Keeper	Martyn DAY	RWxY, BH20 6JA

**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

Constitution 5 Jun 15 (amended 31 Mar 17)

How the charity is constituted

Association

Trustee selection methods

Appointed by Existing Trustees

**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.

The Trustees named on page 1 have served throughout the year. The appointment of Trustees is governed by the Constitution. None of the Trustees received any remuneration or reimbursement of expenses during the year.

The Trustees actively review the major risk that the Charity faces on a regular basis. The Trustees have reviewed income and expenditure and have maintained control over expenditure.

**Section C Objectives and activities**

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

To promote the efficiency of the Royal Wessex Yeomanry personnel by any charitable means, including but not limited to, fostering esprit de corps and maintaining contact between past and present members, including antecedent regiments;

To relieve either generally or individually persons who are serving or who have served in The Royal Wessex Yeomanry, or the dependents of such persons, who are in conditions of suffering, need, hardship or distress.

The Trustees have complied with the duty in section 17(5) of the Charities Act 2011 to have due regard to the guidance published by the Charity Commission.

The Charity is able to provide assistance to the persons and their dependants who have served with the above units. This can be in the form of grants of money, paying for services, goods and facilities for them, or making grants of money to other persons or bodies who provide goods, services, etc to those in need.

**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)**

**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.

**Summary of the main achievements of the charity during the year**

The Trustees consider the performance of the Charity has been satisfactory seeing that it has only been in registered as a Fund for a short period.

It has only been a short time since the Charity has started to receive funds and therefore, so far, has not been in a viable position to support anyone up until now.

Due to being newly formed the membership of the Association is still relatively small, growing the numbers, and the income received from having a larger membership, is seen as a priority to ensure the charity is in a position to support those that it has been set up to look after.

## Section E

## Financial review

**Brief statement of the charity's policy on reserves**

The constitution does not specify the requirement of a Reserve, therefore all of the income is applied in furthering the RWxY Assn charitable objects and all surplus income has therefore accumulated in an Unrestricted Fund.

**Details of any funds materially in deficit**

N/A

### 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.

The Fund's main source of income is through a the Service Day's Pay Scheme, with either 100% or 50% of a day's pay being donated to the Charity by the serving community of RWxY.

The Fund does not seek to raise funds direct from the public, instead the Fund solicits support from associated military and charitable organisations.

Regimental and private donations remain an important source of income for the Fund and the Trustees would like to thank all those who have contributed so generously.

## Section F

## Other optional information

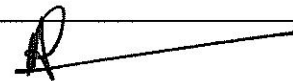
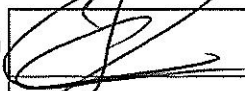
## Section G

## 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)

Charles SPEERS

Anthony SHARMAN

Position (eg Secretary, Chair, etc)

Chairman

Secretary

Date

26/05/21





CHARITY COMMISSION  
FOR ENGLAND AND WALES

RWxY Assn

1162030

## Receipts and payments accounts

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For the period from	01-Apr-20	To	31-Mar-21
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### Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
<b>A1 Receipts</b>					
Subscriptions	2,407	602	-	3,009	2,804
Gift Aid	-	-	-	-	57
Donations	6	-	-	6	25
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>2,413</b>	<b>602</b>	<b>-</b>	<b>3,015</b>	<b>2,886</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>2,413</b>	<b>602</b>	<b>-</b>	<b>3,015</b>	<b>2,886</b>
<b>A3 Payments</b>					
Donation to RWxY PRI (Charity)	1,685	-	-	1,685	1,502
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>1,685</b>	<b>-</b>	<b>-</b>	<b>1,685</b>	<b>1,502</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>1,685</b>	<b>-</b>	<b>-</b>	<b>1,685</b>	<b>1,502</b>
<b>Net of receipts/(payments)</b>	<b>728</b>	<b>602</b>	<b>-</b>	<b>1,330</b>	<b>1,384</b>
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	3,326	2,246	-	5,572	4,188
<b>Cash funds this year end</b>	<b>4,054</b>	<b>2,848</b>	<b>-</b>	<b>6,902</b>	<b>5,572</b>

## 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 £
<b>B1 Cash funds</b>	Bank Account	4,054	2,848	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	<b>4,054</b>	<b>2,848</b>	<b>-</b>
	<small>(agree balances with receipts and payments account(s))</small>			

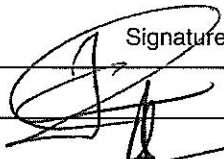
Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>			-	-
			-	-
			-	-
			-	-
			-	-

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

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>			-	
			-	
			-	
			-	
			-	

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

 Signature	Print Name Charles SPEERS Anthony SHARMAN	Date of approval 26/05/21 26/5/21
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