



# 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			
3	James Martin			
4	Robert Kennedy			
5	Wayne Price			
6	Christopher Hart	Honorary Treasurer		
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)

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

## 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.

## 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 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**

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**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	No (if any)
The Royal Wessex Yeomanry Association	1162030

## Receipts and payments accounts

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For the period from	Period start date	To	Period end date
	1-Apr-22		31-Mar-23

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

## 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	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds 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	