

SWANSEA ROUND TABLE CHARITABLE TRUST FUND

England & Wales · Charity number 1162912

Details

Status Registered

Legal form CIO

Registered 2015-07-29

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

Contact

Address c/o Bevan Buckland LLP
Ground Floor
Cardigan House
Castle Court
Swansea
CITY AND

Phone 01792410100

Email enquiries@swansearoundtable.org.uk

Website <http://www.swansearoundtable.org.uk/>

Activities

Objects: FOR SUCH CHARITABLE PURPOSE OR PURPOSES ACCORDING TO THE LAWS OF ENGLAND AND WALES IN GREAT BRITAIN AND ELSEWHERE WORLDWIDE AND OR TO OR FOR THE BENEFIT OF SUCH ONE OR MORE CHARITABLE BODIES TRUSTS ASSOCIATIONS INSTITUTIONS OR ORGANISATIONS ESTABLISHED FOR SUCH CHARITABLE PURPOSES AS AFORESAID AND IN SUCH SHARES AND IN SUCH MANNER AS THE CLUB IN ORDINARY MEETING SHALL IN ITS ABSOLUTE DISCRETION DETERMINE OR SELECT. THE CLUB SHALL COMMUNICATE SUCH DETERMINATION OR SELECTION TO THE TRUSTEES IN WRITING.

Activities: Public fundraising and distribution of donations to local good causes.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Provides Human Resources
- **What:** General Charitable Purposes
- **Who:** The General Public/mankind

Geography

- Carmarthenshire
- City Of Swansea
- Neath Port Talbot

Finances

Period end	Income	Expenditure	Assets	Employees
2025-05-31	£3,335	£1,678	-	-
2024-05-31	£4,355	£4,131	-	-
2023-05-31	£766	£0	-	-
2022-05-31	£3,075	£3,014	-	-
2021-05-31	£1,250	£1,915	-	-

Trustees

Name	Role	Appointed
HEFIN JONES	Chair	2015-07-29
Henry Lloyd Davies ACA		2018-06-01
Jonathan Jones		2018-06-01
Jonathon Williams		2026-03-10

SWANSEA ROUND TABLE CHARITABLE TRUST FUND

England & Wales - Charity number 1162912

Accounts



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	06	2024		31	05	2025

Section A Reference and administration details

Charity name

Swansea Round Table Charitable Trust Fund

Other names charity is known by

Registered charity number (if any)

1162912

Charity's principal address

C/o Bevan & Buckland, Cardigan House, Castle Court
 Enterprise Park, Swansea, UK
 Postcode SA7 9LA

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	Hefin Jones			
2	Henry Lloyd Davies			
3	Jonathan Jones			
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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
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Elected by Members of Swansea Round Table (57)

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

To make charitable grants to organisations and individuals as agreed by the members of Swansea Round Table.

There was fundraising at events which raised money for the charity along with the annual sleigh run collection.

The charity gave out over £1,000 in donations to local good causes.

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)

Any organisation that would like to apply for a grant should contact the charity by letter or email hld@bevanbuckland.co.uk with the reference Swansea Round Table.

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 charity made a number of donations in the year including providing cash donations to Mumbles Rangers and Matthews House.

Brief statement of the charity's policy on reserves

The charity aims to keep sufficient reserves to cover any unexpected day to day costs but as there are few or no overheads the aim is to donate the majority of funds raised to local causes.

Details of any funds materially in deficit

None

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.

June 2024 - May 2025	£	£
Income		
Fundraising	£ 531	
Sleigh Income	£ 2,804	
Gift aid	£ -	
Total Income	£ 3,335	
Expenditure		
Donations to good causes	£ 1,150	
41 Club Fundraising Share	£ -	
Fundraising costs	£ 528	
Total Expenditure	£ 1,678	
Surplus for the year	£ 1,657	
Brought Forward Bank Balance	8,759	
Carried Forward Bank Balance		10,416

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

Signature(s)	J Jones	H Jones
Full name(s)	Jonathan Jones	Hefin Jones
Position (eg Secretary, Chair, etc)	Trustee	Trustee
Date	6 th March 2026	

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Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	06	2023		31	05	2024

Section A Reference and administration details

Charity name

Swansea Round Table Charitable Trust Fund

Other names charity is known by

Registered charity number (if any)

1162912

Charity's principal address

C/o Bevan & Buckland, Cardigan House, Castle Court
Enterprise Park, Swansea, UK

Postcode SA7 9LA

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	Hefin Jones			
2	Henry Lloyd Davies			
3	Jonathan Jones			
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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
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Elected by Members of Swansea Round Table (57)

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

To make charitable grants to organisations and individuals as agreed by the members of Swansea Round Table.

There was one fundraising dinner which raised money for the charity along with the annual sleigh run collection and a stall to raise money at the Swansea air show.

The charity gave out over £2,000 in donations to local good causes.

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)

Any organisation that would like to apply for a grant should contact the charity by letter or email hld@bevanbuckland.co.uk with the reference Swansea Round Table.

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 charity made a number of donations in the year including providing cash donations to Morgans Army, a local junior rugby team, friends of Ysgol Crug Lasas well as others and buying food for the local food bank and chocolates for children in hospital.

Brief statement of the charity's policy on reserves

The charity aims to keep sufficient reserves to cover any unexpected day to day costs but as there are few or no overheads the aim is to donate the majority of funds raised to local causes.

Details of any funds materially in deficit

None

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.

June 2023 - May 2024	£	£
Income		
Fundraising	£ 1,774	
Sleigh Income	£ 2,581	
Gift aid	£ -	
Total Income	£ 4,355	
Expenditure		
Donations to good causes	£ 2,240	
41 Club Fundraising Share	£ 1,031	
Fundraising costs	£ 860	
Total Expenditure	£ 4,131	
Surplus for the year	£ 224	
Brought Forward Bank Balance		8,535
Carried Forward Bank Balance		8,759

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)	<i>J Jones</i>	<i>H Jones</i>
Full name(s)	Jonathan Jones	Hefin Jones
Position (eg Secretary, Chair, etc)	Trustee	Trustee
Date	13 th November 2024	

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Trustees' Annual Report for the period

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Section A Reference and administration details

Charity name

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Other names charity is known by

Registered charity number (if any)

1162912

Charity's principal address

C/o Bevan & Buckland, Cardigan House, Castle Court
Enterprise Park, Swansea, UK

Postcode SA7 9LA

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	Hefin Jones			
2	Henry Lloyd Davies			
3	Jonathan Jones			
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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

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

Charitable Incorporated Organisation

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

Elected by Members of Swansea Round Table (57)

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

To make charitable grants to organisations and individuals as agreed by the members of Swansea Round Table.

There was one fundraising dinner which raised money for the charity.

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)

Any organisation that would like to apply for a grant should contact the charity by letter or email hld@bevanbuckland.co.uk with the reference Swansea Round Table.

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 charity did not receive many requests for funding during the year and none that were approved. The charity has made a number of donations since the year end.

Brief statement of the charity's policy on reserves

The charity aims to keep sufficient reserves to cover any unexpected day to day costs but as there are few or no overheads the aim is to donate the majority of funds raised to local causes.

Details of any funds materially in deficit

None

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.

	£	£
2022 - May 2023		
Income		
Fundraising	£ 733	
Donations	£ 33	
Gift aid	£ -	
Total Income	£ 766	
Expenditure		
Donations to good causes	£ -	
41 Club Fundraising Share	£ -	
Fundraising costs	£ -	
Total Expenditure	£ -	
Surplus for the year	£ 766	
Brought Forward Bank Balance	7,770	
Carried Forward Bank Balance		8,535

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

Signature(s)	J Jones	H Jones
Full name(s)	Jonathan Jones	Hefin Jones
Position (eg Secretary, Chair, etc)	Trustee	Trustee
Date	30 th October 2023	

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Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	06	2021		31	05	2022

Section A Reference and administration details

Charity name

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Other names charity is known by

Registered charity number (if any)

1162912

Charity's principal address

C/o Bevan & Buckland, Cardigan House, Castle Court
Enterprise Park, Swansea, UK

Postcode SA7 9LA

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	Hefin Jones			
2	Henry Lloyd Davies			
3	Jonathan Jones			
4	Ian Welsh		1 st June 2021 to Dec 2021	
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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

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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

To make charitable grants to organisations and individuals as agreed by the members of Swansea Round Table.

There were a number of fundraising events during the year and the charity was fortunate to benefit from a grant from Lambert Smith Hampton.

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)

Any organisation that would like to apply for a grant should contact the charity by letter or email hld@bevanbuckland.co.uk with the reference Swansea Round Table.

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 charity gave a number of donations including a £2,500 donation to support young carers in memory of Swansea Round Tabler Ian Welsh who sadly passed away during the year having served as a trustee of the charity since its formation.

The charity also gave a grant to help feed the homeless at Christmas.

Brief statement of the charity's policy on reserves

The charity aims to keep sufficient reserves to cover any unexpected day to day costs but as there are few or no overheads the aim is to donate the majority of funds raised to local causes.

Details of any funds materially in deficit

None

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.

Brought forward bank balance	£	£7,709
2021 - May 2022		
Income		
Fundraising	£	1,146
Donations	£	1,929
Gift aid	£	-
Total Income	£	3,075
Expenditure		
Donations to good causes	£	3,014
41 Club Fundraising Share	£	-
Sleigh Upgrade & Costs	£	-
Total Expenditure	£	3,014
Carried Forward Bank Balance	£	7,770

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

Signature(s)	J Jones	H Jones
Full name(s)	Jonathan Jones	Hefin Jones
Position (eg Secretary, Chair, etc)	Trustee	Trustee
Date	20/02/2023	

SWANSEA ROUND TABLE CHARITABLE TRUST FUND

England & Wales - Charity number 1162912

Accounts



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	06	2020		31	05	2021

Section A Reference and administration details

Charity name

Swansea Round Table Charitable Trust Fund

Other names charity is known by

Registered charity number (if any)

1162912

Charity's principal address

C/o Bevan & Buckland, Langdon House, Langdon Road,
Swansea, UK

Postcode

SA1 8QY

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	Hefin Jones			
2	Ian Welsh			
3	Jonathan Jones			
4	Henry Lloyd Davies			
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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

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Trustee selection methods
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Elected by Members of Swansea Round Table (57)

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

To make charitable grants to organisations and individuals as agreed by the members of Swansea Round Table.

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The year was impacted by the covid pandemic. Sadly, the usual fundraising events were not able to go ahead but the charity still made donations of over £1,500 during the period.

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)

Any organisation that would like to apply for a grant should contact the charity by letter or email hld@bevanbuckland.co.uk with the reference Swansea Round Table.

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 charity gave a number of donations including assisting the local children's ward at Morriston Hospital and donations to help feed the homeless at Christmas.

Brief statement of the charity's policy on reserves

The charity aims to keep sufficient reserves to cover any unexpected day to day costs but as there are few or no overheads the aim is to donate the majority of funds raised to local causes.

Details of any funds materially in deficit

None

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.

Brought Forward Bank Balance	£	8,373
2020 - May 2021		
Income		
Fundraising	£	-
Donations	£	-
Gift aid	£	-
Bank Incentive	£	1,250
Total Income	£	1,250
Expenditure		
Donations to good causes	£	1,915
41 Club Fundraising Share	£	-
Sleigh Upgrade & Costs	£	-
Total Expenditure	£	1,915
Carried forward Balance	£	7,708


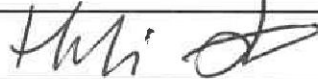
Section F Other optional information

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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

Signature(s)		
Full name(s)	Jonathan Jones	Hefin Jones
Position (eg Secretary, Chair, etc)	Trustee	Trustee
Date	6/10/2021	