

The Simon Trust (Autism) CIO
Registered Charity Number: 1163069

Report of the Trustees
for the period ended 30 April 2025

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The Simon Trust (Autism) CIO

CHAIR'S REPORT for the CHARITY COMMISSION

This year The Simon Trust has celebrated its 10th anniversary! It is amazing to think back to our first Trustees' meeting in September 2014, when we knew what we wanted to create but had not even found the land on which to do so. How far we have come since then! In September 2025 we had a 10th anniversary celebration, to which we invited trustees, patrons, parents and generous donors. Many of our supporters congratulated us on what we have achieved in these 10 years, but it is definitely team work and we could not have done it without the huge support we have received from so many – for which we are truly grateful.

In 2025, Linden Farm was without a permanent manager from January until June, and several key staff sadly left. However, we now have a permanent manager again, which is so important for stability, and we hope that she will be able to get staff numbers up again, especially drivers, as they have recently been in short supply.

The Simon Trust has continued to personalise and enhance Linden Farm for its residents, as we set out in our original mission. In 2025 we provided them with a table tennis table, which some of the residents are able to use. We have had a new shed for the side-by-side trike built beside the cycle track so that it could be stored there instead of in the other bike shed which was rather full. We have had extra matting installed under the trim trail, to make it safer, and have had the Sensory Room serviced and parts repaired – and gradually the staff are learning to use this facility for a wider variety of activities. And recently we were pleased to provide utensils and equipment for the fortnightly Bird Club at Linden Farm, which is run by two very creative and dedicated parents.

The Simon Trust was chosen as the Charity of the Year 2025-26 for Farnham Golf Club Ladies' and Men's Captains, and they have held several fund-raising events including "Four rounds of golf in a day", which took place on one of the hottest days of the year! And last week they presented us with a cheque for £32,000 for The Simon Trust, which is amazing. And in June 2025, the Waverley Singers gave a concert in aid of The Simon Trust, which raised £870.

The Old Barn is still boarded up because of a history of asbestos there in the past, and SCC has now offered to cap the ground so that this space can be opened up again. However, so that any possible remaining asbestos is not disturbed again, it has been agreed that the building we have been planning as a flexible space for Arts, Crafts, Music or a Gym, would be better located elsewhere at Linden Farm – and a suitable spot has been found at the top corner of the field, adjacent to the 400m cycle track which we provided in 2023. This building is our fund-raising focus at the moment, and when built it will be something that the residents will benefit from more and more as they grow older.

Local builders provided us with two



Thakeham very kindly more Volunteer Days at

Linden Farm in 2025, which has been a huge help. Each time their team has worked really hard weeding the cycle track and flower beds and they have generally smartened up the site. The Simon Trust also paid for a gardener to come in on three days during the summer.

And finally, as always, I would like to say a huge thank you to all our trustees, for their loyalty, patience, time and thoughtful contributions to The Simon Trust whenever they are consulted. I am extremely grateful, and look forward with hope to another successful year ahead.

Sally Lawrence
Chair
The Simon Trust
9 February 2026

Report of the Trustees for the period ended 30 April 2025

The Simon Trust (Autism) CIO

The Simon Trust (Autism) CIO

Registered Charity Number: 1163069

Principal Address

Gairholm
Littleworth Road
The Sands
FARNHAM, Surrey. GU10 1JW

Trustees

Sally Lawrence (Chair)	elected 10 Aug 2015
Peter Lawrence	elected 10 Aug 2015
Gill Gillard	elected 10 Aug 2015
Annette Lanaghan	elected 10 Aug 2015
Simon Slater	elected 10 Aug 2015
Anthony Lawrence	elected 10 Aug 2015
Amanda Perrin	elected 2 July 2021
James Forward	elected 10 June 2024

Simon Slater is also a trustee of The Matrix Trust (1081852)

Bankers

Lloyds Bank plc
Farnham Branch
PO Box 1000
Andover. BX1 1LT

Structure, Governance and Management

Organisation and Governing Document

The Simon Trust (Autism) CIO is a Charitable Incorporated Organisation registered on 10 August 2015.

The Chair, reporting to the Board of Trustees, carries out day-to-day management.

The Board keeps the skill requirements for the trustee body under review.

New trustees may be sought through a dialogue with candidates in relevant sectors. The ultimate decision on selection is a matter for the Board of Trustees.

When new trustees are appointed, they are given an introduction to the work of the charity and provided with the information that they need to fulfil their roles.

Financial Controls (including Reserves and Investments) Policy

This policy covers all aspects of how the charity handles its receipts, payments and investments. It will be reviewed each year. The policy is made available to the trustees.

Trustees debate six-monthly reports on all transactions relating to and the status of, the financial position of the charity.

An independent examiner is appointed when relevant.

All data stored complies with the requirements of the General Data Protection Regulation (GDPR).

The annual report and accounts are filed in accordance with the requirements of the Charity Commission after approval by the trustees.

Budgets setting out future expenditure are prepared and approved by the trustees.

The bank and investment accounts are regularly reconciled. Unexpected transactions are reported to the trustees. The trustees regularly review the investment accounts to ensure an acceptable risk and suitable rates of return.

Significant payments (in excess of £50) require a proposal form and the approval of the trustees.

Donors are identified with further consideration as to tainted money. Gift Aid is claimed in a timely manner in accordance with HMRC requirements.

All assets are recorded and any valuation maintained as relevant.

Report of the Trustees (continued) for the period ended 30 April 2025
The Simon Trust (Autism) CIO

Risk management

The trustees have a duty to identify and review risks to which the charity is exposed and to ensure that appropriate controls are in place to provide reasonable assurance against fraud and error. The trustees are of the opinion that the reserves and known subsequent income are sufficient for at least short to medium term financial requirements.

Public benefit

The charity has due regard to the guidance published by the Charity Commission on public benefit.

Objectives and Activities

The objects of the Simon Trust (Autism) CIO are:

- 1/ To relieve the needs of adults with autism and severe learning difficulties in Surrey and West Sussex particularly, but not exclusively, by:
 - a) undertaking or assisting in the planning, establishment, construction, provision and running of appropriate living accommodation and long-term adult life care services for such persons,
 - b) assisting in the support, care and treatment of such persons by providing equipment, facilities, services, support, education and practical advice.
- 2/ To advance the education of the general public in areas relating to autism.

Trustees Responsibility Statement. The Trustees are responsible for preparing the Trustees Annual Report and Financial Statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice: UKGAAP).

The law applicable to charities in England & Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period.

In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently,
- make judgements and estimates that are reasonable and prudent,
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements,
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation,
- comply with the charity's governing document,
- comply with the Financial Standard for Smaller Entities (FRS 105),
- comply with the Charities Act 2022.

The trustees are responsible for keeping records that disclose, with reasonable accuracy, at any time, the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2022, the Charity (Accounts and Reports) Regulations 2016 and the provisions of the Trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

On behalf of the Board:

Sally Lawrence
Chair

Date: 21 January 2026

Notes to the financial statements for the period ended 30 April 2025
The Simon Trust (Autism) CIO

1/ Comparative figures.

Comparative figures relate to the previous period of twelve months.

2/ Accounting policies.

Accounting convention

The financial statements have been prepared under the "Receipts and Payments Accounts scheme (CC16c)".

Income resources

All incoming resources are included on the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy.

Resources expended

Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Reserves

At the end of the period, the charity had no future commitments and, therefore, the reserves are uncommitted.

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees. Restricted funds, should they become relevant, can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purpose. There were no restricted funds held at this period end.

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Marketing Equipment	2 years
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3/ Voluntary Income

	2025	2024
Unrestricted donations	£6,278	£4,934
Restricted donations	nil	£12,010

Notes to the financial statements for the period ended 30 April 2025
The Simon Trust (Autism) CIO

4/ Balance Sheet & Expenses Analysis

Opening Balance 1/05/2024

made up as:

Assets	Current account			£1,414
	Deposit accounts	Cambs & Counties	£22,521	
		Redwood Bank	£79,942	£103,877
Liabilities				nil
				£103,877

Transactions during the year

Monies received by donation	£6,278	
<i>less</i> Expenses paid out	(£12,664)	
<i>less</i> Administration costs	(84)	
<i>add</i> Deposit interest earned	£3,371	(£3,099)

Closing Balance as at 30/04/2025

made up as:

Assets	Current account		£3,945	
	Deposit accounts	Cambs & Counties	£23,534	
		Redwood Bank	£73,299	
Liabilities			nil	£100,778

5/ Investment income

Cambridge & Counties Bank (180 day) yielded £1,013 interest (2024: £928).

Redwood Bank yielded £2,358 interest (2024: £2,403)

6/ Costs of generating income	2025	2024
Fund raising expenses	£nil	£605
Depreciation	£nil	£nil

7/ Governance costs

General expenses	£84	£84
Audit	nil	nil
Professional fees	nil	nil

8/ Trustees Remuneration and benefits

There was no trustee remuneration or other benefit for the period (2024: nil).

Trustees Expenses

No trustee expenses were incurred in carrying out relevant duties during the year (2024: nil).

9/ Tangible Fixed Assets

There were no tangible fixed assets acquired or sold in the period.

10/ Debtors: Amounts falling due

There were no Debtor amounts due (2024: nil).

11/ Creditors: Amounts falling due

There were no Creditor amounts due (2024: nil).

12/ Related party transactions

There were no related party transactions in the period (2024: nil).

13/ Ultimate Controlling Party

Trustees have equal rights with no controlling party. Decisions are made on a majority basis.