

The Dr Carol Ann Yates Trustees' Annual Report
Reporting period 01.06.2020. to 31.05.2021

Charity Name

The Dr Carol Ann Yates Foundation

Registered Charity Number

1164953

Principal Address

c/o 26 Broadway Road, Evesham, Worcestershire, WR11 1BG

Trustees

The charity trustees during the period of this report were Robert Walsh, Christine Grove and Andrew Auger, John Clifford and Martin King.

Names of the Charity Trustees

Trustees managing the charity on the date covered by this report:

Robert Walsh,
Christine Grove, Chair
John Clifford
Andrew Auger
Martin King

Names and Addresses of Advisers (optional)

Solicitors:

Browne Jacobson LLP, Mowbray House, Castle Meadow Road, Nottingham, NG2 1BJ

Investment Company:

CCLA, Senator House, 85 Queen Victoria Street, London EC4V 4ET

Financial Advisers:

St James's Place Wealth Management, St James' Place House, 5 Oaks Court, Warwick Road, Borehamwood WD6 1GS

Type of Governing Document

The charity has its own formally adopted constitution, consistent with its status as a Charitable Incorporated Organisation on 25 July 2014. Instructions to set up the charity were left in the Will of an ex-student of Evesham High School, Carol Yates.

The constitution was amended on 03.07.19. to reflect that:

There shall be a minimum of three trustees of the CIO at all times but there shall be no maximum number

The constitution also noted:

If any Trustee who was appointed because, at the time of their appointment, he or she was a Governor of The De Montfort School or any succeeding Secondary School, should cease to be a Governor of that school, their appointment as a Trustee of the CIO should terminate immediately although for the avoidance of doubt he or she may be reappointed by the remaining Trustees (at the discretion of any such remaining Trustees)