



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From **01/04/2022** Period start date To **31/03/2023**
Period end date

Charity name: Baldev Goyal Charitable Trust

Charity registration number:1166898

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	General charitable purposes, education & training, prevention or relief of poverty, religious activities, arts & culture, Advancement of health or saving of life, promoting religious & racial harmony, supporting those with disadvantage and disability
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	Donations to places supporting the charity's purpose. For financial year 2022-2023 – religious and health-based activities.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Yes, the trustees have read the guidance issued by the Charity Commission on Public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	Donations made into the Charity's fund made by volunteers

Other		

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	Donations to the Hindu Welfare Association of Essex (HWAE) has allowed it to conduct religious and social events that promoted peaceful worship and supported the Hindu community. It allowed purchase & maintenance of their equipment and allowed funding of face to face gatherings and education of children and young people into the Hindu culture to promote tolerance in religious and cultural activities and worship. Donations to Great Ormond Street and Royal National Institute for the Blind allowed them to continue their research and provide health care to those in need they serve. Donations to Mouth and Foot Painting Artists helped the organisation to self-help in painters who paint without the use of their hands.

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		The bank account was locked as the Founding Chairman Mr Goyal passed away 19th July 2022 and access to funds to spend only became available in mid-late 2023.

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Positive balance of £127,243.25 in current account
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Reserves held pending applications for grants.
Amount of reserves held	Para 1.22	£127,243.25 in current account, no savings account held.
Reasons for holding zero reserves	Para 1.22	
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	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Trust deed
How is the charity constituted? (e.g unincorporated association , CIO)	Para 1.25	Unincorporated
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	Original trustees remain in place. If one needed replacing, a new trustee would be proposed, seconded, and voted upon. A trustee should have the values pertaining to the purpose of the charity.

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	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	Baldev Goyal Charitable Trust
Other name the charity uses	BG Charity Trust
Registered charity number	1166898
Charity's principal address	22 Brookside Hornchurch Essex RM11 2RS

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	Mr Baldev Goyal	Founding trustee	Died 19/07/2022	
2	Dr Mina Goyal	Chair		
3	Mrs Sumitra Goyal	Trustee		
4	Mr Andrew Coombe	Trustee		
5	Mr Sunil Gupta	trustee		
6				
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17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
Mr Baldev Goyal		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	Nil
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

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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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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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)		
Full name(s)	Dr Mina Goyal	
Position (eg Secretary, Chair, etc)	Chair	
Date	21/01/2024	

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Charity Commission Annual Return 2023

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BALDEV GOYAL CHARITABLE TRUST
Charity registration number: 1166898

Most of the information you give in this form will become publicly available on the Register of Charities. Any field that the Charity Commission will not display will be clearly marked.

This document is a record of the information provided in the Annual Return 2023.

PART A - Charity information

Financial period

Financial period start date

01/04/2022

Financial period end date

31/03/2023

Income and spending

Income £

£ 26,138

Spending £

£ 4,003

Number of contracts from government

How many contracts (other than grant agreements) did your charity receive from central government or a local authority during the financial period for this return?

0

Number of grants from government

How many grants did your charity receive from central government or a local authority during the financial period for this return?

0

Income breakdown

Donations and legacies (excluding Endowments Received)

£ 26,001

Charitable activities

£ 0

Other trading activities

£ 0

Investments

£ 0

Other

£ 137

Grantmaking

Is grant making the main way your charity carries out its purposes?

Yes

Recipients of grants

Please round all figures to the nearest pound (do not enter decimal points or commas).

Individuals

£ 0

Other charities

£ 4,003

Other organisations that are not charities

£ 0

Grant recipients related parties

Are any of the grant recipients related parties to the charity?

No

Trustee payments

Excluding out of pocket expenses, for what were any of the trustees paid during the financial period for this return?

☒ e. None of the trustees have been paid

Did any of the trustees resign and take up employment with your charity in the financial period of this return?

No

Income from outside the UK

Did your charity receive income from outside of the United Kingdom in the financial period of this return?

No

Delivering activities outside the United Kingdom

Did your charity deliver charitable activities outside of the United Kingdom in the financial period of this return?

No

Spending outside England & Wales

Did your charity spend funds outside of the United Kingdom in the financial period of this return?

No

Total Spending outside England & Wales

£

Trading subsidiaries

Does the charity have any trading subsidiaries?

No

Charity contact details correct

Is the contact address displayed from the Register of Charities, correct?

Yes

Charity headquarters details correct

Is this the same address that you use as your charity's administrative headquarters?

Yes

Charity contact address

Address Line 1

22 Brookside

Address Line 2

Hornchurch, Essex

Address Line 3

Address Line 4

Address Line 5

Other

Postcode

RM11 2RS

Country

Charity Headquarters address

Address Line 1

22 Brookside

Address Line 2

Hornchurch, Essex

Address Line 3

Address Line 4

Address Line 5

Other

Postcode

RM11 2RS

Country

Membership type

Is the charity part of a wider group structure with a parent body and subsidiary bodies?

no, the charity is not part of a wider group structure

Employment contract types

People were permanently employed by your charity

0

People were on fixed-terms contracts with your charity

0

Self-employed people were working for your charity

0

Governance policies

Internal charity financial controls policy and procedures

Yes

Safeguarding policy and procedures

Yes

Financial reserves policy and procedures

Yes

Complaints policy and procedures

Yes

Serious incident reporting policy and procedures

Yes

Internal risk management policy and procedures

Yes

Trustee expenses policy and procedures

Yes

Trustee conflicts of interest policy and procedures

Yes

Investing charity funds policy and procedures

Yes

Campaigns and political activity policy and procedures

Not applicable

Bullying and harassment policy and procedures

Yes

Social media policy and procedures

Yes

Engaging external speakers at charity events policy and procedures

Not applicable

Safeguarding

Has your charity provided services to children and/or adults at risk in the financial period of the return?

No

Serious Incidents

Has your charity reported all Serious Incidents (including any historical incidents) that the charity became aware of during the financial period of this return?

There were no incidents to report

External risk and impact

Donations

Unknown/No Change/Not Applicable

Other income - grants

Unknown/No Change/Not Applicable

Other income - contracts

Unknown/No Change/Not Applicable

Other income - investment

Unknown/No Change/Not Applicable

Expenditure on charitable activities

Unknown/No Change/Not Applicable

Expenditure on overheads

Unknown/No Change/Not Applicable

Number of volunteers

Unknown/No Change/Not Applicable

Number of employees

Unknown/No Change/Not Applicable

Number of trustees

Unknown/No Change/Not Applicable

Fundraising activities

Unknown/No Change/Not Applicable

Capacity to deliver services

Unknown/No Change/Not Applicable

Total service demand

Unknown/No Change/Not Applicable

Volunteers

Excluding trustees, provide an estimate of the number of volunteers who carried out charitable activities on behalf of your charity in the United Kingdom during the financial period of this return?

0

Privacy statement

Any information you give us will be held securely and processed only in accordance with the rule on data protection. We will not disclose your personal details to anyone unconnected to the Charity Commission unless:

- **you have consented to their release; or**
- **we are legally obliged to disclose them; or**
- **we regard disclosure as either (a) necessary so that we can properly carry out our statutory functions or (b) necessary in the public interest.**

We may share and disclose information about you with relevant public authorities, regulatory bodies and agencies, outside the Charity Commission but only if:

- **we can lawfully do so; and**
- **we decide that disclosure is necessary for national security, crime detection, prevention, and law enforcement, or other issues in the public interest**

Information we collect about you

We will use this information:

To enable us to carry out our statutory functions and duties;

This will include the following actions:

- (a) update, consolidate, and improve the accuracy of our records;**
- (b) undertake crime detection and prevention and law enforcement and assist the third parties specified above to investigate or prevent crime and carry out law enforcement;**
- (c) data analysis, testing, research, statistical and survey purposes**

Information we receive from other sources.

Information we receive from other sources

We may combine this information with information you give to us and information we collect about you.

We may use this information and the combined information for the purposes set out above (depending on the types of information we receive).

We will ensure that any such disclosure and use is proportionate; considers your right to respect for your private life; and is done fairly and lawfully in accordance with the data protection principles of the Data Protection Act.

The Data Protection Act 1998 regulates the use of 'personal data', which is essentially any information, however stored, about identifiable living individuals.

As a 'data controller' under the Act, the Charity Commission must comply with it. Any changes we may make to our privacy statement in the future will be set out in the replacement version of this form.

Please check back frequently to see any updates or changes to our privacy policy.

Declaration

This annual return has not been submitted and no Declaration has been made

Tax Return 22/23 - BG Charity Trust

	<u>2023</u>	<u>tax</u> <u>paid</u> <u>gross</u>	<u>2022</u>	<u>tax</u> <u>paid</u> <u>gross</u>
Income -ALL				
Baldev Goyal 21/04/2022	10,000.00		42.29 interest	
Mina Goyal 17/05/2022	1,001.00		501.00 donation	
CELMP 30/01/2023	15,000.00		15,000.00 donation	
			275.25 interest	
Interest	137.35		3,875.00 gift aid	
			45.79 interest	
			10,000.00 donation	
			5,000.00 donation	
Subtotal	26,138.35		34,739.33	
TOTAL	26,138.35		34,739.33	
Interest	137.35			

TAX RETURN 21/22 - BG Charity Trust

EXPENSES-all	<u>91</u> <u>19/22</u>	<u>20/21</u>
Subtotal	-	-
Donations HWAE		
HWAE 13/04/2022	2,001.00	-
HWAE 25/05/2022	1,502.00	
Subtotal	3,503.00	
total	3,503.00	

Other donations

Foot & Mouth painting artists 04/05/2022	100.00
GOS 04/05/2022	200.00
Sight Savers 13/05/2022	200.00

Subtotal	500.00
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TOTAL	4,003.00
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Miscellaneous

B. Goyal	
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