

### Trustee's Report on the year 2022

After the lifting of covid-related restrictions we were able to enjoy a normal year; indeed, the first one since 2019.

#### Some Specific Achievements and Developments in 2022

- Recognising a need, we established an online seminar group on *Medieval Wales and the Marches* enabling scholars to network and share their research. This initiative has been greeted enthusiastically with over 180 university and independent scholars joining the group.
- After an appeal to members, we were able to purchase at auction an account roll for the Honour of Wigmore dated 1387-8. The members of our Medieval Documents Group then transcribed and translated it, and started analysing what they've found.
- In recent years we've run a local history project with primary schools in the area, and this year were able to offer more sessions in schools. For the first time in 2022 we were invited to speak to a group of local sixth-formers studying medieval history. We were able to help them understand something of the history and significance of the Welsh Marches.
- For several years there has been no public access to the shell keep at the top of Wigmore castle. During 2022, we renewed our efforts to solve this problem, developing strong relationships with English Heritage. They are now committed to the reinstatement of suitable steps and have earmarked funds for the work.
- October saw the publication of a new enhanced edition of *On the Trail of the Mortimers* by Society secretary, Philip Hume, that includes Mortimer-related sites across the whole of the Welsh Marches – *On the Trail of the Mortimers in the Welsh Marches*.
- The Society has commissioned Chris Jones-Jenkins, the talented and experienced architectural artist, to produce a new reconstruction drawing of Wigmore castle. The Castles Studies Trust have agreed to provide match funding for this project.
- We were successful in securing a significant grant from the Marc Fitch Fund towards the publication costs for an anthology entitled *The Mortimers of Wigmore 1066-1485: Dynasty of Destiny* to be launched at our conference at the Tower of London on 1st August 2023.
- As an experiment, we launched a photographic competition, inviting members and non-members to submit images illustrating the history of the Welsh Marches.
- In July, we held a joint event at Usk castle in memory of John Grove, the founder of the Mortimer History Society and the Friends of Usk Castle, who died in December 2021.

As in previous years, the rest of this annual report is structured in line with the objects of the Society as set out in our constitution, in order to show how we meet our objectives.

**1. *Promoting the significance of the history of the medieval Mortimer family, and the Welsh Marcher lordships***

In many ways, this objective is a catch-all that encompasses all the activities that we do. It is a thread, therefore, that runs through all the sections below as our programme of events, work with schools and universities, website, publications and all the other activities combine to promote the significance of the medieval Mortimers and the Welsh Marcher lordships.

**2. *Work with communities and schools to promote study of the Mortimers and the Welsh Marcher lordships and raise awareness of their significance in medieval history***

*Schools Medieval History Programme*

For the first time since 2019, we were able to organise a full programme with primary schools in south Shropshire/north Herefordshire, indeed, the addition of a new member of the team enabled us to offer more sessions in the schools. Eleven classes from nine schools (316 children) enjoyed the living history day at Ludlow Castle.

*Community Information stalls*

The Society had its regular information stall at the Battle of Evesham Medieval Re-enactment weekend at the start of August. This is now the second largest medieval festival in the country, and, over the two days, there was a constant flow of people wanting to talk about the Mortimers and the Welsh Marcher lordships. Unfortunately, the Ludlow Castle Medieval Christmas Fayre, usually held at the end of November, will not happen again after the losses incurred following the cancellation in 2021 when Storm Arwen caused so much damage to the marquees and stalls.

*General Publicity*

With normal in-person events resuming, the regular publicity for events maintains the profile of the Society. We remain in regular contact with all the major historical societies across Wales and the Marches, many of whom happily circulate the information about MHS events to their members, which has resulted in both increased attendance and new members.

*2022 Welsh Marches Photographic Competition*

To help publicise the Society, we organised a photographic competition, inviting people to submit photographs that interpreted the Welsh Marcher lordships. The competition was widely publicised, including to photography clubs in the Welsh Marches; however, the number of entries was disappointing and, although there were some good images, there not sufficient to go ahead with producing a calendar for 2024.

**3. *Work with colleges and universities to encourage and support local and national scholarly research into the contribution of the medieval Mortimer family to the history and culture of the British Isles, and also of the history, economy, society, and culture of the medieval Marches of Wales***

### The Mortimer History Society Essay Prize

The annual prize continues to be greatly appreciated by scholars and academic institutions for the way in which it encourages and supports new research on aspects of borderlands in the medieval period, particularly by younger scholars. In 2022, one essay was awarded a commendatory prize: "*Diagrams, poems, dragons, Puns*": *the Mortimer visual project in the 14<sup>th</sup> century* written by Miguel C Fernandes, a PhD student at the University of Chicago. A second essay by MHS member, Deborah Gentry, was commended: "*Finding Cornwall in Shropshire: Imaginary landscapes in Rhonabwy's Dream and Fouke Fitz Waryn*". Both will be published in the next Journal.

### Leeds International Medieval Congress, 4-7th July 2022

Following our success in 2021, the Society again organised strands at the 2022 Leeds International Medieval Congress (IMC), the world's premier academic conference for medieval studies, held annually at the University of Leeds, and awarded bursaries to early career researchers allowing them to attend to present their papers. Whilst the continuing restrictions had meant that the 2021 IMC had been held online only, this time it was a hybrid event enabling over 3000 speakers and delegates from around the world to come together. Under the umbrella theme of Borders, eight speakers contributed diverse but complimentary papers to a packed seminar room during two fascinating sessions in the MHS strand (organised by our President, Dr Paul Dryburgh) on Tuesday 5<sup>th</sup> July.

The first session was started by Dr Deborah Youngs of Swansea University, who considered whether the medieval March constituted a culturally syncratic border society, taking testamentary evidence from the Diocese of Hereford. Two papers on the place of Chester in the late Middle Ages followed. Pamela Powell, a doctoral student at the University of Nottingham, looked at the city's role in the Welsh rebellions of the early 15<sup>th</sup> century; and, Professor Barry Lewis of University College Dublin revealed the holy cross, the Rood of Chester, in the church of John the Baptist as a centre of pilgrimage and cross-cultural encounter, particularly a focus for contemporary Welsh poets. The final paper in the first session was presented by Dr Matthew Stevens of Swansea University who contributed a fascinating paper on why Owain Glyn Dwr burned the towns of Wales during his rebellion at the start of the 15<sup>th</sup> century.

The second session brought together four speakers who examined lordship and identity in the medieval marcher lordships. Dr Alastair Ayton of the University of St Andrews explored the 'troublesome trends' of rebellion in the 13<sup>th</sup> century. In her contribution, Dr Sadie Jarrett (Bangor University) investigated identity in the later marcher lords of north Wales in the century after the Glyn Dwr rebellion. Dr Adam Chapman of the Institute for Historical Research chronicled the political history of the lordship of Denbigh. In the final paper, Amy Reynolds, a doctoral student at Bangor University, weighed up evidence for a widely perceived decline in monasticism, focussing on the Cistercian Order in mid-Wales in the 15<sup>th</sup> century.

### New Book launches

During the course of the year, we organised the online launches of two books: *Princely Ambition: Ideology, castle-building and landscape in Gwynedd, 1194–1283* by Dr Craig

Owen Jones (in conjunction with University of Leicester Press); and, *The Growth of Law in Medieval Wales, c. 1100–1500* by Dr Sara Elin Roberts (in conjunction with Boydell & Brewer). Both launches were well attended and stimulated plenty of discussion (and sales!).

#### Online Seminar Group: Medieval Wales and the Marches

Organising and sponsoring strands at the Leeds IMC has made us even more aware of the exciting, innovative research that is being done to bring the lives of the people and communities on the medieval March into greater focus. This research is happening both inside academia and outside by independent scholars. Whilst events such as Leeds IMC provide a great opportunity for academics and scholars to come together once a year, we became aware that the MHS is ideally placed to enable ongoing networking and exchange of ideas. Therefore, during the second half of 2022, we worked with colleagues from Bristol, Swansea, and Chester universities to create a new '*Online Seminar Group: Medieval Wales and the Marches*' to provide a forum for academics and scholars to share new research papers, stimulate discussion, and obtain feedback. The amazing response that we have received, with over 180 academics and independent scholar joining the group plus many offers to give papers in 2023, has confirmed the need. We have received many expressions of support and thanks for taking this initiative. The seminar group's programme started in the Spring term 2023.

#### A New Publication: '*The Mortimers of Wigmore in the Middle Ages, 1066-1485: Dynasty of Destiny*'

Last year, we reported that we had commissioned 13 scholars to each write an essay on an aspect of Mortimer history to be included in an anthology, edited by Dr Paul Dryburgh and Philip Hume, that will be published and launched at our conference at the Tower of London on 1<sup>st</sup> August 2023. This year, we are delighted to report that everything is on schedule. The essays have been received and edited, and images sourced. There is fascinating new content in the essays and some fantastic illustrations. The publisher, Logaston Press, has started work on the layout and design, so everything is on track for publication in the summer. Indeed, progress has been so good that we have organised an extra launch at the Leeds IMC to follow the sessions sponsored by the MHS. Together with Logaston Press we made a successful application to the Marc Fitch Fund for a substantial grant towards the publication costs which will help to keep the book affordable.

#### **4. Increase knowledge about the Mortimer family and all aspects of the Welsh Marcher lordships through lectures, conferences, study trips and publications.**

##### The Annual Programme of Conferences, Lectures and Study Visits

After two years during which it was very difficult to organise 'in-person' events, it has been wonderful to resume a normal programme with members and non-members able to meet together to hear a range of fascinating talks (though, whenever possible, the events are now hybrid enabling online participation by those unable to attend in person).

The continuing restrictions during the winter of 2021–22 meant that our first event of the year in February was an online conference that explored the theme of *Passion and Power*

*in the Marches*. By March, normality had returned, and we were able to hold our AGM in Weobley, with a talk on medieval Weobley and a tour of the medieval buildings.

First organised for 2020, and twice postponed, we were finally able to go ahead with our Spring Conference in May in Knighton organised jointly with the Radnorshire Society, when a series of talks explored '*Murder, Mayhem and Marriage: the Mortimers and the Welsh Princes*'. This was followed by our annual summer lecture in June, which has been renamed the John Grove Memorial Lecture following the death of our founder, when Professor Daniel Power spoke on '*The rupture of the Anglo-Norman aristocracy after the fall of ducal Normandy (1204)*'.

At the start of July, we partnered with Usk Castle Friends for a splendid day at Usk Castle in memory of John Grove, who had been involved in starting both societies. Three talks in the morning were followed by a lovely lunch and time to explore the castle.

At the end of July, we tried a study trip with a difference this year, combining a site visit with talks. Titled '*How to build a castle: A special one-day conference exploring the construction and development of Ludlow castle*', the day started with talks on the practicalities of building a castle and the early development of Ludlow, followed by a visit to the castle to look at the theory in practice. The afternoon followed a similar format looking at later developments.

The autumn symposium in October focussed on *Castles in Wales and the Marches*, whilst the half-day conference at the end of November explored aspects of a '*Medieval Christmas*'.

### Mortimer Matters

Mortimer Matters went from strength to strength with four excellent editions during the course of the year. With reports on past and future society events and activities, in-depth articles on the Mortimers and the Marcher lordships, and book reviews, it continues to be valued and appreciated by members.

### MHS Website

Many of our new members first come across the Society when surfing the internet, so our website is crucial to our marketing effort. We are, therefore, diligent about keeping it up-to-date. It is also the main portal for event ticket sales. Additionally, all the main articles from the MHS Journal and from *Mortimer Matters* are indexed on the website, as are links to all our recorded talks, thus providing an easily-accessible and ever-increasing archive for the Society.

### Publications

Our partnership with Logaston Press continued in 2022. When *On the Trail of the Mortimers* was approaching being sold out for a third time, a decision was taken to produce an enhanced version for the fourth print, expanding the coverage to the whole of the Welsh Marches. *On the Trail of the Mortimers in the Welsh Marches* was published in October 2022. Work has also started on the design and layout of *The Welsh Marcher Lordships II: the South-West*, with publication expected in spring 2023. The third-volume in the series is now expected in 2024.

### Talks to other societies

Every year we are invited to give talks to other societies about the Marcher lordships and/or the Mortimers, with talks given to about 20 societies in 2022, generating new interest in the Mortimers and the Marcher lordships and attracting new members.

### **5. *Studying the archaeology, structural fabric, heraldry, artefacts and documents related to the Mortimer family, and similar medieval Marcher families.***

#### Medieval Documents Research Group

In October last year, due to the generosity of members, the Society was able to purchase an old, rare, and local medieval account roll for the year 1387–88 for Wigmore Honor in North Herefordshire. The group has been able to transcribe and then translate it, with expert help from Paul Dryburgh and Helen Watt who led the group. Like many things, the roll answered some questions but threw up a whole lot more. Therefore, some of the members intend to go to Herefordshire Archive and Record Centre (HARC) as soon as possible to try to answer at least some of them.

Aside from that highlight, the group has continued its regular online sessions developing skills in transcribing and translation medieval documents. Many of the documents members study are written in Latin and mostly relate in some way to the Mortimer family. For the first time towards the end 2021, members tackled a Norman-French document. This year, members have read more in that language, as well as looking at two written in Welsh – the first, taken from the Red Book of Hergest version of the Brut y Tywysogyon, was the account of the seizure from Roger Mortimer (d.1282) of Cefnlllys castle by local Welsh people in 1262; the second document being an extract from a Welsh law text.

Since the first exploratory meeting at Ludlow in 2018, people have gained their knowledge of Latin, the abbreviation conventions the scribes used and the ability to read the writing immeasurably through the careful and well explained learning situation that Paul & Helen have created. We are a friendly group, welcoming new members irrespective of ability. People learn at their own pace and there is certainly no pressure or competition involved in the learning process. If you are interested, or would like further details, please make initial contact via the MHS website via the Medieval Documents Group.

#### Wigmore Castle

As the most iconic location associated with the Mortimers, Wigmore castle is always at the top of our members' lists to visit. Following the pandemic, the number of our overseas members visiting the Marches remains quite low and this is just as well, as access to the shell keep, at the very top of the site, remains impossible. In 2022 we redoubled our efforts to overcome this problem, strengthening our links with English Heritage and applying what pressure we could. Things are now looking much more promising: money has been budgeted to replace the steps to the top and we have attended site meetings with English Heritage to discuss possible solutions.

## Plans for 2023

The highlights of our plans for this year are:

### *The Annual Programme of Conferences, Lectures and Study Visits*

We have already held a successful half-day online conference at the end of January on Education and Learning in Medieval Wales and the Marches (due to the great likelihood of bad weather in January and February, we have decided that this event is best held online only). This year we experimented with arranging a series of evening talks after the half-day to provide the opportunity to explore more aspects of the topic. The great response to this is a strong indication that we should do something similar in 2024.

Today, our AGM in Orleton is being followed by two talks – one on the medieval chests in St George's and one on the Mortimers and Orleton. Our Spring Conference in May will explore 'Marriage, Sex and Dynasty building', whilst the John Grove Memorial Lecture will be given by Dr David Stephenson in the splendid setting of Powis Castle.

The highlight of the year will be the event at the Tower of London on 1<sup>st</sup> August to mark the day of the 700<sup>th</sup> anniversary of the escape by Roger Mortimer (d.1330) in 1323, and to celebrate the publication of our new anthology on the Mortimers.

The Autumn Symposium in October will provide Society members an opportunity to give talks based on their research, whilst the half-day conference in November will look at aspects of writing historical fiction.

### *Other events and activity*

We will again be sponsoring two sessions at the *Leeds International Medieval Congress, 3–7th July 2023*; the 2022 MHS Essay Prize will be judged in March, to be followed by the launch of the 2023 Prize. The next MHS Journal will be published in the spring. The *Online Seminar Group: Medieval Wales and the Marches* has started with a programme of six seminars in the spring term, with more to follow in the summer and autumn terms. The programme of work with primary schools is being finalised.

### *Publications*

As already mentioned, Vol 2 in our series on the Welsh Marcher Lordships, which will cover the south-west, will be published in the spring, and our new anthology in July.

### *Research Bursaries*

An exciting new initiative that will be launched at the AGM is a scheme to provide bursaries to support doctoral students, and students on research-led MA courses, with the costs of research. Students researching aspects of the medieval Welsh Marches and/or the Mortimers will be eligible to apply for one-off bursaries. Whilst in the long-term it may be possible to build up an endowment fund, it would take a very long time as well as tying up considerable amounts of money. The plan, therefore, is to appeal to members each year to donate an amount to the bursary fund. The number of bursaries offered that year would be dependent on the amount raised. Initial soundings have indicated that a number of members would welcome the opportunity to support new research in this way.

### *A new reconstruction drawing of Wigmore castle*

Towards the end of 2022, we made an application to the Castle Studies Trust for matched funding to commission a new reconstruction drawing of Wigmore Castle. Early in 2023, we received the great news that the application had been approved, enabling us to commission MHS member Chris Jones-Jenkins, who is one of the foremost castle reconstruction artists in Wales and England, to start work on the project. As well as developing understanding of what Wigmore might have looked like as a magnificent castle in the early 14<sup>th</sup> century, the reconstruction drawing will help to raise awareness of the castle and the Mortimers.

### *Medieval Documents Research Group*

During the weekend of 25/26 February, many of the group met in Leominster for a workshop led by Paul & Helen. Among the documents studied was one when Roger Mortimer of Chirk was held as a prisoner in the Tower, along with other associates. Another was the will of a 15<sup>th</sup> century vicar of Leominster, this being written in English. The learning event was most enjoyable; so much so that people want to have a similar weekend later in the year, if it can be arranged. The weekend was the first chance to meet personally since before Covid Regulations came into force in 2020. Throughout that period and subsequently, learning has been carried on via Zoom on a regular basis. However, intensive learning that the weekend provides is an excellent chance to improve skills immensely. Additionally, it is a welcome chance to meet with friends but also to greet new members personally.

### **Trustees of the Mortimer History Society, March 2023**



## Balance Sheet detailed

	As at 31/12/2022	As at 31/12/2021
<b>Current assets</b>		
A01: Lloyds Acct	18,974	15,846
A02: Float	50	83
A03: Paypal Acct	1,079	237
A04: Debtors	—	—
A08: Shop Stock at Sale Price	2,925	2,300
<b>Total Current assets</b>	<b>23,028</b>	<b>18,468</b>
<b>Liabilities</b>		
L03: Cheques Not Yet Cleared	—	—
<b>Total Liabilities</b>	<b>—</b>	<b>—</b>
<b>Net Asset surplus (deficit)</b>	<b>23,028</b>	<b>18,468</b>
<b>Reserves</b>		
Excess / (deficit) to date	4,560	(1,039)
Z01: Starting balances	18,468	19,508
<b>Total Reserves</b>	<b>23,028</b>	<b>18,468</b>

Represented by Funds		
Unrestricted	17,710	15,343
Designated	3,029	1,000
Restricted	2,288	2,125
Endowment	—	—
<b>Total</b>	<b>23,028</b>	<b>18,468</b>

*There may be minor discrepancies in the totals if the pence are not being shown*

**Mortimer History Society - 1171392**

**Balance sheet (Separate funds)**

**As at: 31 December 2022**

	General Fund	Designated Funds	Restricted Funds	Endowment Funds	At 31/12/2022 £	At 31/12/2021 £
<b>Current assets</b>						
Stocks and work in progress	2,925	—	—	—	2,925	2,300
Cash at bank and in hand	14,785	3,029	2,288	—	20,103	16,167
<b>Current assets</b>	<b>17,710</b>	<b>3,029</b>	<b>2,288</b>	<b>—</b>	<b>23,028</b>	<b>18,468</b>
<b>Net current assets less current liabilities</b>	<b>17,710</b>	<b>3,029</b>	<b>2,288</b>	<b>—</b>	<b>23,028</b>	<b>18,468</b>
<b>Total assets less current liabilities</b>	<b>17,710</b>	<b>3,029</b>	<b>2,288</b>	<b>—</b>	<b>23,028</b>	<b>18,468</b>
<b>Total net assets less liabilities</b>	<b>17,710</b>	<b>3,029</b>	<b>2,288</b>	<b>—</b>	<b>23,028</b>	<b>18,468</b>
<b>Represented by</b>						
<b>Unrestricted</b>						
Unrestricted - General fund	17,710	—	—	—	17,710	15,343
<b>Designated</b>						
Designated - Events Cancellation Fund	—	1,000	—	—	1,000	1,000
Designated - Research Fund	—	2,029	—	—	2,029	—
<b>Restricted</b>						
Restricted - Ian Mortimer Fund	—	—	—	—	—	412
Restricted - Mortimer History Trail	—	—	—	—	—	(498)
Restricted - Schools and Colleges Cancellation Fund	—	—	1,430	—	1,430	1,430
Restricted - Schools and Colleges Fund	—	—	858	—	858	781
<b>Funds of the charity</b>	<b>17,710</b>	<b>3,029</b>	<b>2,288</b>	<b>—</b>	<b>23,028</b>	<b>18,468</b>

M C Beerley  
Hon Treasurer  
19 January 2023

N. J. Lawrence  
Examiner  
22/02/2023

*There may be minor discrepancies in the totals if the pence are not being shown*

**Analysis of income and expenditure**  
**Selected period: 01 January 2022 to 31 December 2022**

	Unrestricted	Designated	Restricted	Endowment	Total	
					This year	Last year
<b>Income and endowments</b>						
<i><b>Donations and legacies</b></i>						
101 - Subscriptions	5,608	—	—	—	5,608	5,900
102 - Donations	231	1,666	—	—	1,897	601
104 - Gift Aid	897	—	—	—	897	796
<b>Donations and legacies Totals</b>	<b>6,737</b>	<b>1,666</b>	<b>—</b>	<b>—</b>	<b>8,404</b>	<b>7,298</b>
<i><b>Income from charitable activities</b></i>						
212 - John Grove Lecture	382	—	—	—	382	—
201 - Living History Income	—	—	2,686	—	2,686	148
203 - Research Project Income	—	467	—	—	467	—
204 - Early Spring Conf Income	340	—	—	—	340	—
205 - AGM Income	80	—	—	—	80	40
206 - Spring Conf Income	2,943	—	—	—	2,943	—
207 - Summer Visit Income	1,884	—	—	—	1,884	364
208 - Autumn Symp Income	1,409	—	—	—	1,409	3,470
209 - Late Autumn Conf Income	1,085	—	—	—	1,085	299
210 - Mortimer Journal Income	47	—	—	—	47	135
211 - Other Talks and Tours Income	88	—	—	—	88	69
<b>Income from charitable activities Totals</b>	<b>8,261</b>	<b>467</b>	<b>2,686</b>	<b>—</b>	<b>11,414</b>	<b>4,527</b>
<i><b>Other trading activities</b></i>						
301 - Sale of Stock	1,843	—	—	—	1,843	616
<b>Other trading activities Totals</b>	<b>1,843</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>1,843</b>	<b>616</b>
<i><b>Other income</b></i>						
501 - Other Income	—	—	—	—	—	1
<b>Other income Totals</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>1</b>
<b>Income and endowments Grand totals</b>	<b>16,842</b>	<b>2,133</b>	<b>2,686</b>	<b>—</b>	<b>21,662</b>	<b>12,443</b>
<b>Expenditure</b>						
<i><b>Raising funds</b></i>						
E306 - Paypal Charges	79	—	—	—	79	98
E307 - Subs Refunds	—	—	—	—	—	50
E101 - Website Costs	236	—	—	—	236	373
E102 - Purchase of Stock	1,211	—	—	—	1,211	872
<b>Raising funds Totals</b>	<b>1,526</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>1,526</b>	<b>1,394</b>

*There may be minor discrepancies in the totals if the pence are not being shown*

	Unrestricted	Designated	Restricted	Endowment	Total	
					This year	Last year
<b>Expenditure on charitable activities</b>						
E214 - John Grove Lecture	323	—	—	—	323	—
E201 - Marketing	398	—	—	—	398	103
E202 - Living History Project Costs	—	—	2,609	—	2,609	148
E203 - Mort Hist Trail Costs	—	—	14	—	14	—
E204 - Research Project Costs	—	2,604	—	—	2,604	—
E205 - Early Spring Conf Costs	311	—	—	—	311	369
E207 - Spring Conf Costs	2,511	—	—	—	2,511	641
E208 - Summer Study Visit Costs	1,953	—	—	—	1,953	627
E209 - Autumn Symp Costs	1,601	—	—	—	1,601	3,127
E210 - Late Autumn Mini-Conf Costs	445	—	—	—	445	222
E211 - Newsletter Costs	960	—	—	—	960	960
E212 - Mortimer Journal Costs	460	—	—	—	460	2,829
E213 - Other Talks and Tours	748	—	—	—	748	1,908
<b>Expenditure on charitable activities Totals</b>	<b>9,715</b>	<b>2,604</b>	<b>2,623</b>	<b>—</b>	<b>14,942</b>	<b>10,936</b>
<b>Other expenditure</b>						
E206 - AGM Costs	67	—	—	—	67	58
E301 - Governance Costs	261	—	—	—	261	80
E302 - Trustee Expenses	229	—	—	—	229	345
E303 - Insurance Costs	—	—	—	—	—	150
E304 - Miscellaneous Costs	—	—	—	—	—	517
E305 - Software Costs	75	—	—	—	75	—
<b>Other expenditure Totals</b>	<b>632</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>632</b>	<b>1,151</b>
<b>Expenditure Grand totals</b>	<b>11,874</b>	<b>2,604</b>	<b>2,623</b>	<b>—</b>	<b>17,102</b>	<b>13,483</b>

*There may be minor discrepancies in the totals if the pence are not being shown*



Section A

Independent Examiner's Report

Report to the trustees/  
members of

Charity Name

MORTIMER HISTORY SOCIETY

On accounts for the year  
ended

31 / 12 / 2022

Charity no  
(if any)

1171392

Set out on pages

1-6

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 / 12 / 2022.

Responsibilities and  
basis of report

As the charity trustees, you are responsible for the preparation of the accounts in accordance with the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent  
examiner's statement

~~[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [ ] if not applicable.~~

I have completed my examination. I confirm that no material matters have come to my attention (~~other than that disclosed below~~\*) in connection with the examination which gives me cause to believe that in, any material respect,:

- the accounting records were not kept in accordance with section 130 of the Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

\* Please delete the words in the brackets if they do not apply.

Signed:

N. J. Lawrence

Date:

22 / 10 / 2023

Name:

NATASHA JAYNE LAWRENCE

Relevant professional  
qualification(s) or body  
(if any):

Address:

41 WESTCROFT

LEOMINSTER, HEREFORDSHIRE

HR6 8 HF

**Section B**

**Disclosure**

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here details of any items that the examiner wishes to disclose.