

Trustees' Report on the year 2024

Highlights of 2024

After the highs of 2023 (events at the Tower of London and Powis Castle; publication of two books), 2024 was inevitably a slightly quieter year. Nevertheless, the year saw significant developments for the Society, which are detailed in this Trustees' Annual report. The highlights were:

- We have revisited and revived our presence across social media to enable the Society to improve its communications.
- The living history day at Ludlow Castle was the largest yet with eleven schools and 387 pupils participating.
- Thanks to the enormous generosity of MHS members and supporters we were able to grant two research bursaries of £1,000 for the first time.
- The new MHS Heraldry Study Group was launched in 2024 and has got off to a flying start with 55 interested members participating in the online course 'Teach Yourself Heraldry', three online lectures, and two study.
- Our regular programme of hybrid (in-person and online) conferences, online mini-conferences and study trips went from strength to strength with numerous members enjoying a range of fascinating topics. For many, the highlight of the programme was the Christmas Soiree at Wigmore Abbey, and we look forward to future events there.
- The MHS Essay Prize received a number of high-quality entries, and the Society again sponsored sessions at the Leeds International Medieval Congress. Now in its second year, the 'Online Seminar Group: Medieval Wales and the March' again had a varied and interesting programme across the three terms.
- Mortimer Matters continues to provide essential information about the Society and its activities along with a range of stimulating articles, whilst the MHS Journal will be published in March 2025.
- New members continue to join at a steady rate with membership at the highest level ever.

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, 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. A particularly important development though is worth highlighting:

Social Media

During the year, we revisited and revived our presence across social media. We now have active platforms on Instagram, X (formerly Twitter) and Facebook. We see social media as an increasingly important communication channel for us that will extend our reach, strengthen our membership drive and enable us to share important society news and initiatives more widely. Digital channels are now the primary source of news, information and insights for most people and it's important for us to be there. In short, our social platforms will help connect the MHS to its members, members to each other and all of us to the wider world.

Prior to the launch of the new channels in the autumn of 2024, the Society's presence on social had been haphazard and confusing. Not anymore. We've appointed a social-savvy team to make sure MHS news, views and information are posted regularly.

Find us on social media at:

On X @MortimerSociety

On Instagram @therealmortimerhistorysociety

On Facebook @therealmortimerhistorysociety

On YouTube, we'll continue to post videos of conference presentations at @MortimerHistorySociety..

Please ensure you're following us on these pages and no other as all other pages, including the Facebook group, are now being closed down to eliminate confusion.

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

As in previous years, preparations for the 2024 programme began in November with a meeting called for all schools interested in taking part to begin planning for the following year. After a slow response at first, it was pleasing to see that many schools were interested in taking part in the events that we offered, with three schools only booking their places in the Castle in the last month before the event!

After the in-school sessions had been heavily promoted, we were pleased that schools booked so many! Three of us provided a total of seventeen sessions, which were greatly appreciated by both pupils and their teachers. The heraldry session led by Hugh Wood is very popular and it was impressive a week later how much the class had remembered from the session that they had had. The session with the man-at-arms has also been very popular, although we will have to find a replacement next year as Mike Beazley has decided to hang up his armour. Kathy Cowell has continued to provide a session on the history of maps to include a history of the area surrounding each school.

A total of eleven schools took part in the programme and brought a total of 387 children to Ludlow Castle on 26th June. The weather was wonderful, and the children enjoyed the usual six events in rotation. It was good to see them all taking such an interest in every activity. At lunchtime there was a change from the usual display between a knight and the man-at-arms. Instead, the knight was seen off by an archer and a crossbow man to a chorus of cheers! The day in the castle in June was most successful and everyone who took part made very favourable comments and we all are looking forward to the next year's event which has been booked again for Wednesday June 25th next year.

Financially, the school's project was very successful this year. The total income was £4070 in total which includes income from a session held for the Worcestershire YMCA. Our total expenditure was £3,127, which has left us with a surplus of £973, which should provide a cushion for next year when we expect that the number of children will be less.

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 many societies in 2024, generating new interest in the Mortimers and the Marcher lordships and attracting new members.

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.

General Publicity

The regular publicity for events maintains the profile of the Society, along with the leaflet in many public places. 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.

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

MHS Research Bursary

Thanks to the enormous generosity of MHS members and supporters, in only our second year of providing research bursaries, enough funds were donated to enable the Society to offer, for the first time, two bursaries in the same year. Thus, in 2024 the Mortimer History Society granted bursaries valued at £1,000 to two students, Joshua Williams and Catherine Clarke who are, respectively, PhD students at Swansea University and Keele University.

Attention has now turned to fundraising for the 2025 bursary programme. An event held at Wigmore Abbey in January (postponed from December due to weather) raised £1,200 and further fundraising efforts – supported by emails to members, social media and articles in *Mortimer Matters* are ongoing. The fundraising period will close on 14 April and applications from students invited from 19 May, with a closing date of 30 June. We expect to announce the successful candidate/s in July.

For more details of how to donate to our bursary programme, or to apply for a bursary go to <https://mortimerhistorysociety.org.uk/society/bursary>.

The MHS is also reaping benefits from bursary recipients' involvement in our events and publications. Our 2024 recipient Catherine Clarke gave a talk called 'Power and Patronage in the Shropshire March' at the Autumn 2024 Symposium, held at Ludlow Assembly Rooms. At the same symposium Gabriella Williams – our first bursary recipient in 2023 – gave her talk 'The Mortimers in Yorkist Iconography' which was presented with excellent images, many of them heraldic. She followed this up with an article for the January 2025 edition of *Mortimer Matters*. Finally, Joshua Williams (our other 2024 recipient) gave an on-line talk called 'Decolonisation of Later Medieval and Early Modern Cardiff' at the 'Marcher Miscellany' half-day Zoom conference in January 2025. His talk provoked many thoughtful suggestions and ideas for his PhD from attendees.

The Mortimer History Society Essay Prize

The MHS Essay Prize continues to celebrate and reward academic excellence and discovery. In April 2024 we were proud to announce our 2023 winners. First Prize went to Dr Ian Bass, Honorary Research Fellow in Medieval History at the University of Wales, Trinity St David, Lampeter, whose essay *An Ecclesiastical Mortimer*, explores the church career of Edmund Mortimer (d. 1304). Second prize went to Ali Al-Khafaji, a fourth-year PhD student at the University of Bristol for his essay, which demonstrates that a document in the National Archives long understood to relate to Richard II as 'Prince of Cestre' in fact relates to the Black Prince – a piece of astonishing documentary detective work.

Two commendations were awarded. The first to Caroline Bourne, a post-doctoral researcher at the University of Reading and the second to Catherine Clarke, a second-year PhD student at the University of Keele.

Ian and Ali will received £750 and £300 respectively. All four essayists were also granted free membership of the Society for three years and their essays will be published in vol 7 of the Society's Journal, which will be published in the late summer of 2025.

The entry period for the 2024 Essay Prize closed on 1 March and we expect to announce the winners in late April.

Leeds International Medieval Congress, 1st–4th July 2024

The sessions sponsored by the Society have become a regular part of the Leeds International Medieval Congress (IMC), the world's premier academic conference for medieval studies, held annually at the University of Leeds. In 2024, the strand was organised again by Amy Reynolds of Bangor University. Again, we awarded bursaries to scholars who were giving papers in our sponsored sessions and did not have access to institutional funding. Under the IMC 2023 umbrella theme of *Crisis*, the MHS sponsored three sessions, with nine speakers contributing fascinating papers that brought new research to life.

The first session was titled *How 'crisis' impacted Welsh religious expression*. The speakers – Jenny Bell, Rhun Emlyn, Tracey Silvester, David Thornton – explored a range of interesting topics that varied from *'Men behaving badly and Women being Saintly'*, to *'Turbulent Priests: Clergy and rebellion in Post-Conquest Wales'*, to *'St Michael as Warrior-Angel, Guardian and Psychopomp in times of crisis'*, to *'Strangers in a Not-so-Strange Land? The Prosopography of English Dependent Pories in Late Medieval Wales'*.

The second session, titled *Critical Border Studies, IV: Medieval Wales and the March in Crisis*, was also in partnership with the University of Bristol's 'Mapping the March: Medieval Wales and England, c.1282–1550' project. The three speakers – Caroline Bourne, David Stephenson, and Adam Chapman – analysed particular episodes of crisis through their respective papers: *'Crisis? What Crisis?: The Beginnings of the Great Revolt of 1136'*, and *'Crisis? What Crisis'*, and finally, *'Recovery and Reinvention (or not talking about the crisis) in 15th century Wales'*. I'm sure you've spotted that a common theme emerged!

The third session, titled *'Literacy, Law, and Learning in Wales during times of 'Crisis'* concluded the programme, though, unfortunately, one of the speakers was taken ill and was unable to give her paper. Even so, two papers by Leah Hennick and Emily Abercrombie on, respectively, *'Medieval Identity Crisis: Welsh Land Inheritance Laws Following the Edwardian Conquest'*, and *'A crisis of faith or bitter slander: Gerald of Wales' De Principis Instructione'* generated much interest.

In addition to the seminar sessions, the Society was represented at a Round Table discussion on *'(The study of) Medieval Wales in Crisis'* which stimulated debate and ideas about the future study of medieval Wales and the March. Throughout the week, many academics and scholars again expressed their appreciation for what the Society does to encourage and support research, particularly by young scholars, through the Essay Prize, the Journal, IMC sponsorship, Online Seminar Group, and the Research Bursary.

Online Seminar Group: Medieval Wales and the Marches

The online seminar group which enables scholars and academics to share their research continued to grow from strength to strength with a further six seminars across the three terms. As in the previous year, the papers covered a range of fascinating topics evidencing the breadth and variety of the research that is happening: the origins and development of the Tironensian Community at Titley; Mapping the Medieval March of Wales; Naming Places in Medieval Wales; Remembering the Mortimers in early modern Wales; contrasts and comparisons between the Welsh and Scottish Marches; and, the role of clergy during the Glyndwr rebellion.

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

Whilst not quite attaining the highs of the previous year's programme (we can't have a conference at the Tower of London and a talk at Powis Castle every year!), 2024 was nevertheless a varied and interesting programme. The online conferences in February and November explored 'Women of Wales and the March', and 'Wales and the Wars of the Roses'. The AGM in March was held at the historic Mortimer church of St James, Wigmore, when Chris Jones-Jenkins fascinated members with his talk on how he is developing a reconstruction of Wigmore castle. The annual full-day Spring Conference in May explored 'Landscapes of the Medieval Marches', whilst the full-day Autumn Symposium enjoyed the usual mix of five eclectic and stimulating talks.

We were highly honoured when Professor David Carpenter delivered the annual John Grove Memorial Lecture in June. Members and non-members enjoyed a delicious cream tea on a sunny evening at The Grange, Leominster, before listening to Professor Carpenter's talk on 'King Henry III and Wales: co-existence rather than conquest'. Unfortunately, we weren't able to provide cream teas to the many who attended online!

We were delighted to organise an online launch for the publication of Annie Garthwaite's, our vice-chair, second novel: *The King's Mother*

We tried a different approach for our study visit in 2024. Continuing with the theme of 'landscapes' from the Spring Conference, we assessed 'Evesham: Landscape of a Battle' through a combination of three talks interspersed with visits to the key sites where the battle unfolded.

For many the highlight of the year was the Christmas Soiree at Wigmore Abbey despite the best attempts by the weather to spoil it – postponed from the scheduled date because of the violent storms, snow was then forecast on the rescheduled date. However, an earlier start enabled people to enjoy the hospitality at Wigmore Abbey before the snow started to fall. Members were fascinated by the splendours of the fourteenth century Abbots' Parlour and the Undercroft. It is wonderful that the new owners of the Abbey (and new members of the MHS) are keen for the Society to make use of their home and we look forward to future events there.

Mortimer History Society Journal

Although planned for 2024, circumstances unfortunately delayed to March 2025 the publication of the sixth volume of the Journal of the Mortimer History Society. This volume contains no fewer than five peer-reviewed essays and three reviews. Three of these essays were submitted to the Mortimer History Society's Essay Prize competition for 2023. A first prize and second prize were awarded, worth £750 and £300 respectively. The third essay submitted to the same competition was commended and published in the Journal. Two further essays were submitted to the MHS for publication in the Journal, one produced by an eminent scholar of medieval Wales and the March and the other by an early-career scholar with a specialist knowledge of the twelfth- and thirteenth-century episcopal acts of the bishops of Bangor and St Asaph. Four of these essays directly reflect the vibrancy and longevity of the research being conducted at this time on the history of the Mortimers and the medieval Marches of Wales by scholars, many of whom are currently at different stages of their careers. One essay – the prize-winning essay – demonstrates the wider appeal of studying borderlands generally, not least for the themes common to them, whether that be the borderlands of the British Isles or on the Continent. The reviews included in this latest volume continue to highlight the richness and variety of research being conducted on medieval England and the Marches of Wales, research which invariably touches upon the Mortimer family and its senior members. From the humdrum yet important thirteenth-century pipe rolls (voluminous records of financial audit completed at the Exchequer), to a study of perhaps the most well-known of thirteenth-century political reformers – Simon de Montfort (d. 1265), earl of Leicester – and to arguably the most evocative of knightly orders: the Templars, the sixth volume of the Journal demonstrates the wide appeal of studying the history of medieval England, in which the Mortimers and their region were at times significant and at others unquestionably central to the flow of events.

It is the intention of the Mortimer History Society to publish the seventh volume of the Journal of the MHS by the summer of 2025, with the eighth volume being published shortly thereafter in early 2026. The aim of this timeline is to ensure the publication of all subsequent volumes falls within the same year of their production.

Mortimer Matters

In 2024 we published four issues of *Mortimer Matters*, the society's newsletter, with issues in January, April, July and October – each coming out at the end of the respective month. *Mortimer Matters* is edited by Annie Garthwaite, supported by Elizabeth Holley as proof reader and by Ark Design, a professional design company.

Content continues to reflect the ongoing interests of the Society in the Mortimer family, the Welsh Marcher lordships, and relevant aspects of the medieval history of Wales and England. Our features have covered a wide range of issues from the scandalous rise and ignominious fall of Hugh Despenser the Younger, to the Mortimer Retinue's contribution to the Yorkist dynasty. Trustee Kathy Cowell also contributed a series of features that act as a guide for anyone interesting in the architecture of medieval churches. We also continued to focus on the research interests of MHS members, including bursary recipient Catherine Clarke (John de Cherleton), Caroline Bourne (12th century Gower), Katie Dungate (William Herbert) and Philip Hume (Roger Mortimer d.1282).

We've continued to use *Mortimer Matters* as a vehicle to promote the Society's events programme, adding value by including interviews with or articles by some of our key speakers. For example, in our January 2024 issue Dr Erin Lloyd Jones reprised themes from her conference presentation of the same month about the women who helped to build the political and physical infrastructures of medieval Wales. In April Dr Matt Lampitt introduced us to 'the Ludlow Scribe', a writer at the heart of literary culture in the early 14th century March.

We continue to focus on books, with regular reviews and our 'bookshelf' feature, which gives a short review of new or upcoming titles, is proving popular. Not least because it often includes special discounts for Society members.

As ever, we're keen to hear what members think about *Mortimer Matters* – what you'd like to see more of or what you think you'd like to contribute. The editor is always on the lookout for feature ideas and suggestions that will make this newsletter ever more valuable to its readers. So please don't hesitate to get in touch at mm@mortimerhistorysociety.org.uk.

Current and past issues of *Mortimer Matters* can be downloaded from our website at www.mortimerhistorysociety.org.uk/publications

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

Medieval Documents Research Group

During the past year, the group, co-ordinated by Yve James, has continued working on a variety of documents relating either to the Mortimer family, or the Welsh March.

Recently, it was decided to make a transcription and translation of the Chronicle about the Mortimers held at the University of Chicago (MS 224). It was compiled by members of the community of Wigmore Abbey in the late fourteenth century. The most famous transcription is that created by the antiquarian William Dugdale in the seventeenth century. Dugdale did not translate it, nor as far as is known, has a full translation been made. It is a richly decorated item, has coloured initial letters, pen decorations in the margins, heraldic shields and two beautiful pictures, as well as long, involved family trees. Threaded throughout is the narrative about the Mortimer family of Wigmore (and associated branches) who wished to establish their right to the English Crown. It is a most interesting document to work on. To keep other skills current, the group reads other relevant documents such as accounts.

At the beginning of March 2025, a weekend event has been organised when members can study documents to improve their skills. We are pleased to welcome two people new to our group to this weekend.

MHS Heraldry Study Group

Launched in 2024 our heraldry study group got off to a flying start. At the end of the year we have 55 interested members, with 33 of them living within a couple of hours of Ludlow, in the centre of the Welsh Marches. As well as five heraldry experts, the group includes a hard core of 15 who are working hard to learn as much as they can to increase their knowledge of the subject.

The starting point for learning heraldry from scratch is, of course, the “Teach yourself Heraldry” course that is freely available via the heraldry home page on our website. This has been supplemented during the year with three online lectures delivered by Hugh Wood, two of them reinforcing the basics of modern heraldry and one tackling the less-formalised heraldry of the medieval period. Four members have contributed nine articles on different aspects of heraldry and these are all posted and freely available on the home page.

The highlights for those who have been able to travel have been the two study days. The first of these was held in Ludlow and combined a morning of study followed by a visit to St Laurence’s church in Ludlow. On the other day we spent the morning in Hereford cathedral before visiting the outstanding little church at Holme Lacy, which was full of Scudamore heraldry and includes the funeral hatchment of the 11th Duke of Norfolk.

6. Changes in Personnel

During the year, Sophie Ogilvie reluctantly resigned as a Trustee in order to have more time to manage her work and health. We’re extremely grateful for all the contributions that Sophie has made to the Society.

Plans to look forward to in 2025

2025 sees two important anniversaries, which are both reflected in our plans for 2025:

- It is the 600th anniversary of the death of Edmund Mortimer, 5th earl of March. Although the Mortimer line continued through his nephew Richard, duke of York, and his grandson, Edward IV, Edmund was the last lord of Wigmore and earl of March with the name ‘Mortimer’. The Spring Conference in May will mark this anniversary with a retrospective look at the impact and importance of the Mortimers across four countries, and four centuries. And, a special online conference in July will focus on the Mortimers’ impact in Ireland
- It is the 800th anniversary of the reissue of Magna Carta and the Charter of the Forest in 1225. These are the most significant versions of the Charters as it was the 1225 ones that were incorporated into the Statutes of the country. The conference in October will explore the changing role of the Crown and the changing nature of rulership across the late medieval period.

Another important aspect of our work in 2025 will be contributing to the work of the Victoria County History (VCH) in north-west Herefordshire. In Spring last year, a meeting was called for those interested in working towards a history of the N.W. parishes of Herefordshire. Six people attended, including two representatives of the Mortimer History Society (MHS), two from VCH and two from Leintwardine History Society (LHS). The parishes that could be included in a ‘Red’ book for this area were discussed; suggested were Brampton Bryan, Leintwardine and Wigmore. These parishes would produce what the VCH call ‘Short’ books, while the ‘Red’ book would be all the parishes for the area being covered (in this case N.W. Herefordshire) gathered together in one book. At a June meeting, it was thought Leintwardine would be a good place to start as it has

a very active local history society with its archive, museum and a meeting room. Wigmore could probably follow in two or three years, depending on the progress LHS made.

Subsequently, there have been two more meetings at Leintwardine to identify areas in the template where LHS has material to cover some of the topics. Any gaps would involve volunteers and specialists. It has become clear during this time that volunteers are not expected to cover the whole template. Gaps in information would be covered by a specialist employed to produce the books that VCH published during the course of the project. Recent examples of these 'Short' books for Herefordshire are Ledbury and its surrounding parishes.

The group is planning to organize a general meeting later in the year when people could come and if they wish volunteer for topics shown in the simplified template. The venue and date will be notified to members when it is known.

Trustees of the Mortimer History Society, April 2025

Mortimer History Society - 1171392

Balance Sheet detailed

	As at 31/12/2024	As at 31/12/2023
Current assets		
A01: Lloyds Acct	15,194	13,539
A02: Float	65	50
A03: Paypal Acct	6,758	3,610
A04: Debtors	—	—
A08: Shop Stock at Sale Price	1,293	1,826
Total Current assets	23,312	19,026
Liabilities		
L03: Cheques Not Yet Cleared	—	—
Total Liabilities	—	—
Net Asset surplus (deficit)	23,312	19,026
Reserves		
Excess / (deficit) to date	4,285	(4,002)
Z01: Starting balances	19,026	23,028
Total Reserves	23,312	19,026

Represented by Funds

Unrestricted	17,953	14,318
Designated	1,912	1,916
Restricted	3,446	2,791
Endowment	—	—
Total	23,312	19,026

Mike Beazley

M G Beazley, Hon Treasurer
15 January 2025

N J Lawrence, Independent Examiner

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 2024

	General Fund	Designated Funds	Restricted Funds	Endowment Funds	At 31/12/2024 £	At 31/12/2023 £
<i>Current assets</i>						
Stocks and work in progress	1,293	—	—	—	1,293	1,826
Cash at bank and in hand	16,660	1,912	3,446	—	22,019	17,199
Current assets	17,953	1,912	3,446	—	23,312	19,026
Net current assets less current liabilities	17,953	1,912	3,446	—	23,312	19,026
Total assets less current liabilities	17,953	1,912	3,446	—	23,312	19,026
Total net assets less liabilities	17,953	1,912	3,446	—	23,312	19,026
<i>Represented by</i>						
<i>Unrestricted</i>						
Unrestricted - General fund	17,953	—	—	—	17,953	14,318
<i>Designated</i>						
Designated - Events Cancellation Fund	—	1,000	—	—	1,000	1,000
Designated - Heraldry Fund	—	326	—	—	326	—
Designated - Medieval Documents Group Fund	—	585	—	—	585	916
<i>Restricted</i>						
Restricted - Bursary Fund	—	—	132	—	132	—
Restricted - Mortimer History Trail	—	—	—	—	—	—
Restricted - Schools and Colleges Cancellation Fund	—	—	1,430	—	1,430	1,430
Restricted - Schools and Colleges Fund	—	—	1,884	—	1,884	1,361
Funds of the charity	17,953	1,912	3,446	—	23,312	19,026

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Analysis of income and expenditure
Selected period: 01 January 2024 to 31 December 2024

	Unrestricted	Designated	Restricted	Endowment	This year	Total Last year
Income and endowments						
<i>Donations and legacies</i>						
101 - Subscriptions	6,368	—	—	—	6,368	5,877
102 - Donations	136	—	2,132	—	2,268	1,870
104 - Gift Aid	1,123	—	—	—	1,123	1,120
<i>Donations and legacies Totals</i>	7,628	—	2,132	—	9,760	8,868
<i>Income from charitable activities</i>						
212 - John Grove Lecture	958	—	—	—	958	1,256
201 - Living History Income	—	—	3,830	—	3,830	2,920
204 - Early Spring Conf Income	568	—	—	—	568	1,005
206 - Spring Conf Income	2,555	—	—	—	2,555	2,327
207 - Summer Visit Income	1,099	—	—	—	1,099	6,996
208 - Autumn Symp Income	1,906	—	—	—	1,906	2,056
209 - Late Autumn Conf Income	756	—	—	—	756	733
210 - Mortimer Journal Income	—	—	—	—	—	64
211 - Other Talks and Tours Income	84	50	—	—	134	250
<i>Income from charitable activities Totals</i>	7,928	50	3,830	—	11,808	17,611
<i>Other trading activities</i>						
301 - Sale of Stock	773	—	—	—	773	183
<i>Other trading activities Totals</i>	773	—	—	—	773	183
<i>Other income</i>						
501 - Other Income	—	—	—	—	—	330
<i>Other income Totals</i>	—	—	—	—	—	330
Income and endowments Grand totals	16,330	50	5,962	—	22,342	26,993

Expenditure*Raising funds*

E306 - Paypal Charges	84	—	—	—	84	81
E307 - Subs Refunds	35	—	—	—	35	14
E101 - Website Costs	247	—	—	—	247	336
E102 - Purchase of Stock	618	—	—	—	618	1,699
<i>Raising funds Totals</i>	985	—	—	—	985	2,131

Expenditure on charitable activities

E214 - John Grove Lecture	230	—	—	—	230	937
E308 - Bursary Payments	—	—	2,000	—	2,000	1,000

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

	Unrestricted	Designated	Restricted	Endowment	This year	Total Last year
E201 - Marketing	2,105	—	—	—	2,105	595
E202 - Living History Project Costs	—	—	3,307	—	3,307	2,417
E204 - Medieval Documents Group expenditure	—	331	—	—	331	1,112
E205 - Early Spring Conf Costs	—	—	—	—	—	116
E207 - Spring Conf Costs	2,266	—	—	—	2,266	2,807
E208 - Summer Study Visit Costs	671	—	—	—	671	6,422
E209 - Autumn Symp Costs	733	—	—	—	733	1,604
E210 - Late Autumn Mini-Conf Costs	—	—	—	—	—	1,338
E211 - Newsletter Costs	2,104	—	—	—	2,104	1,060
E212 - Mortimer Journal Costs	1,050	—	—	—	1,050	5,815
E213 - Other Talks and Tours	972	168	—	—	1,140	2,994
<i>Expenditure on charitable activities Totals</i>	10,135	499	5,307	—	15,941	28,222
<i>Other expenditure</i>						
E206 - AGM Costs	530	—	—	—	530	—
E301 - Governance Costs	100	—	—	—	100	190
E302 - Trustee Expenses	—	—	—	—	—	49
E303 - Insurance Costs	180	—	—	—	180	75
E304 - Miscellaneous Costs	107	55	—	—	162	252
E305 - Software Costs	155	—	—	—	155	75
<i>Other expenditure Totals</i>	1,073	55	—	—	1,129	641
Expenditure Grand totals	12,195	554	5,307	—	18,056	30,995

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

Independent Examiner's Report on the accounts

Section A Independent Examiner's Report

Report to the trustees/ members of	Charity Name		
On accounts for the year ended		Charity no (if any)	
Set out on pages	(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 DD / MM / YYYY.

Responsibilities and basis of report As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of 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 the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement 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:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records
- statutory fees were not accounted for correctly

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn 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: **Date:**

Name:

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

Address:

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 brief details of any items that the examiner wishes to disclose.



Section A

Independent Examiner's Report

Report to the trustees	Mortimer History Society		
On accounts for the year ended	31th December 2024	Charity no (if any)	1171392
Set out on pages			

(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 DD / MM / YYYY.

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of 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 in connection with the examination (other than that disclosed below *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities 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:

28/02/2025

Name:

Natasha Jayne Lawrence

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

Address:	41 Westcroft
	Leominster, Herefordshire
	HR6 8HF

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

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

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