

# THE PETER MAXWELL DAVIES TRUST

England & Wales · Charity number 1171965

## Details

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Other names	THE MAX TRUST
Status	Registered
Legal form	CIO
Registered	2017-03-09
Register	<a href="#">View on the Charity Commission register</a>

## Contact

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Address	50 Walkerscroft Mead London SE21 8LJ
Phone	02082443604

## Activities

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**Objects:** THE OBJECTS OF THE CIO ARE TO ADVANCE THE EDUCATION OF THE PUBLIC IN THE ART OF MUSIC AND IN PARTICULAR THE PROMOTION OF PUBLIC EDUCATION IN AND APPRECIATION OF THE LIFE AND WORKS OF PETER MAXWELL DAVIES.

**Activities:** Giving grants for recordings, research and composer commissions to widen the appreciation of the music and legacy of Peter Maxwell Davies

## Classification

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- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Provides Advocacy/advice/information, Other Charitable Activities
- **What:** Education/training, Arts/culture/heritage/science
- **Who:** Children/young People, The General Public/mankind

## Geography

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- Throughout England And Wales

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-12-31	£23,816	£1,750	-	-
2024-12-31	£0	£1,250	-	-
2023-12-31	£0	£3,188	-	-
2022-12-31	£84	£2,560	-	-
2021-12-31	£4,940	£1,069	-	-

## Trustees

Name	Role	Appointed
CHRISTOPHER AUSTIN		2017-03-09
Dr Nicholas James Jones		2020-10-19
MS SALLY HILARY GROVES		2017-03-09
SYLVIA GOWAN JUNGE		2017-03-09

**THE PETER MAXWELL DAVIES TRUST**

England & Wales - Charity number 1171965

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# Accounts

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## Trustees' Annual Report for the period

From 1 January 2025 Period start date To 31 December 2025 Period end date

Charity name: The Peter Maxwell Davies Trust

Charity registration number: 1171965

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance the education of the public in the art of music and in particular the promotion of public education in and appreciation of the life and works of Peter Maxwell Davies.
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	<p>The Trust are mindful that their resources are extremely modest, being the proceeds of the last sale of manuscripts by the late composer to the British Library in 2016. The main focus of the Trust's use of these funds is to establish a permanent legacy of his soundworld by supporting recordings of unrecorded works; and to encourage creative exploration of his work.</p> <p>2025 has seen intensive pursuance of a major recording centred on <b>A Mirror of Whitening Light</b> and <b>Trojan Games</b>, with some fascination, recently discovered small pieces from various periods of the late composer's life. The recording is in partnership with NMC Recording and will be released in November 2026.</p> <p>The Trust also helped with a recording devoted to unrecorded piano music by Peter Maxwell Davies by Richard Casey for Prima Facie, to be released in 2026.</p> <p>Dimitri Askenazy was collecting funds for his recording of the <b>Clarinet Quintet</b> and <b>Strathclyde Concerto No.4</b>. The Trust gave financial support to this venture in 2023. The recording will be released by Paladino early in 2026.</p> <p>The Trust again asked Gabriel Williams to assume responsibility for the Trust's website, MaxOpus, for a fee of £1,000.00</p> <p>The Trust continued to work closely with the PMD Research Groupon their regular forums. These have fed into the vital ongoing research into the life and music of Peter Maxwell Davies by the two eminent</p>

		<p>scholars Dr Nicholas Jones and Dr Richard McGregor.</p> <p>Liaison with the composer's three publishers, in particular the publishing of the newly discovered works and fragments and enquiries about the composer's music, is frequent and ongoing.</p> <p>The Trustees have had regard to the guidance issued by the Charity Commission on public benefit.</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have had regard to 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	To preserve the legacy of the composer through research, recordings and other musical activities in his name.
Policy on social investment including program related investment	Para 1.38	To fund projects outside London which promote greater musical engagement: Music in unusual places.
Contribution made by volunteers	Para 1.38	Not applicable
Other		Not applicable

### Achievements and Performance

	SORP reference	
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<p>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.</p>	<p>Para 1.20</p>	<p>See 'Summary of main activities: above.</p> <p>These achievements have increased the knowledge and understanding of the public in music and the arts in general and the works of Peter Maxwell Davies in particular and the heritage he left behind, and thereby enhanced their cultural wellbeing.</p>
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**Additional information (optional)**

You may choose to include further statements where relevant about:

<p>Achievements against objectives set</p>	<p>Para 1.41</p>	
<p>Performance of fundraising activities against objectives set</p>	<p>Para 1.41</p>	
<p>Investment performance against objectives</p>	<p>Para 1.41</p>	
<p>Other</p>		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The Trust was in a healthy position at the end of the year with sufficient funds to meet its anticipated administration costs and prospective grant funding for the foreseeable future.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Reserves are not considered necessary.
Amount of reserves held	Para 1.22	£0
Reasons for holding zero reserves	Para 1.22	Not considered necessary
Details of fund materially in deficit	Para 1.24	Not applicable
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	The Trustees do not consider that there are any such uncertainties.

### 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	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charitable Incorporated Organisation
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	Trustees are selected by the existing trustees.

### 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	The Peer Maxwell Davies Trust
Other name the charity uses	The Max Trust
Registered charity number	1171965
Charity's principal address	50 Walkerscroft Mead London SE21 8LJ



## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	Not applicable
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	Not applicable
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	Not applicable

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
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#### 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

Not applicable
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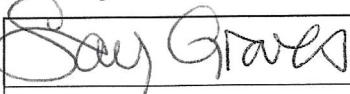
### Other optional information

Not applicable
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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)	Sally Hilary Groves	
Position (eg Secretary, Chair, etc)	Chair	
Date	02.02.2025	



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Charity Name  No (if any)

## Receipts and payments accounts

CC16a

For the period from  Period start date  To  Period end date

### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	-	-	-	-	-
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total receipts</b>	-	-	-	-	-
<b>A3 Payments</b>					
Grants	-	-	-	658	-
Trustees expenses	-	-	-	-	-
Administration expenses	-	-	-	-	250
Website	-	-	-	1,000	1,000
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	1,658	1,250
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total payments</b>	1,658	-	-	1,658	1,250
<b>Net of receipts/(payments)</b>	- 1,658	-	-	- 1,658	- 1,250
<b>A5 Transfers between funds</b>	-	-	-	-	-
<b>A6 Cash funds last year end</b>	23,816	-	-	23,816	-
<b>Cash funds this year end</b>	21,953	-	-	21,953	23,816

## Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>		-	-	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	-	<b>21,953</b>	-

(agree balances with receipts and payments account(s))

Agreement Error Unrestricted funds to nearest £	Agreement Error Restricted funds to nearest £	OK Endowment funds to nearest £
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**B2 Other monetary assets**

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

**B3 Investment assets**

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-
		-	-
		-	-

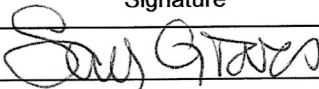
**B4 Assets retained for the charity's own use**

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

**B5 Liabilities**

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
		-	
		-	
		-	
		-	
		-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date
	Sally Groves	02.02.2026

**THE PETER MAXWELL DAVIES TRUST**

England & Wales - Charity number 1171965

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# Accounts

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## Trustees' Annual Report for the period

From 1 January 2024 To 31 December 2024

Charity name: The Peter Maxwell Davies Trust

Charity registration number: 1171965

### Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance the education of the public in the art of music and in particular the promotion of public education in and appreciation of the life and works of Peter Maxwell Davies.
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	<p>The Trustees are mindful that their resources are extremely modest, being the proceeds of the last sale of manuscripts by the late composer to the British Library in 2016. The main focus of the Trust's use of these funds is to establish a permanent legacy of his soundworld by supporting recordings of unrecorded works; and to encourage creative exploration of his work.</p> <p>There were no major initiatives in 2024. The one really major recording initiated by the Trust, centred on A Mirror of Whitening Light, has unfortunately been delayed yet again. The Trustees hope that 2025 will see its fruition.</p> <p>The Trust again asked Gabriel Williams at the Royal Academy of Music to assume responsibility for the Trust's website, MaxOpus, for a fee of £1,000.00.</p> <p>The Trust continued to work closely with the PMD Research Group on their regular zoom Forums, where invited guests share their experience of working with the composer. These have fed into the vital ongoing research into the life and music of Sir Peter Maxwell Davies by the two eminent scholars Dr Nicholas Jones and Dr Richard McGregor.</p> <p>Liaison with Sir Peter Maxwell Davies' three publishers and enquiries about the</p>

		composer's music is continual and ongoing.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have had regard to 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	To preserve the legacy of the composer, through research, recordings and other musical activities in his name.
Policy on social investment including program related investment	Para 1.38	To fund projects outside London which promote greater musical engagement: Music in unusual places.
Contribution made by volunteers	Para 1.38	Not applicable
Other		Not applicable

#### 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	See 'Summary of the main activities' above.  These achievements have increased the knowledge and understanding of the public in music and the arts in general and the works of Peter Maxwell Davies in particular and the heritage he left behind and thereby enhanced their cultural well-being.

#### 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		

## Financial Review

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Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	The trustees do not consider that there are any such uncertainties.

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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	Trustees are selected by the existing trustees
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#### Additional information (optional)

You may choose to include further statements where relevant about:

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Relationship with any related parties	Para 1.51	
Other		

#### Reference and Administrative details

Charity name	The Peter Maxwell Davies Trust
Other name the charity uses	The Max Trust
Registered charity number	1171965
Charity's principal address	50 Walkerscroft Mead London SE21 8LJ

#### 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	Sally Hilary Groves MBE	Chair		
2	Sylvia Gowan Junge			
3	Christopher Austin			
4	Dr Nicholas James Jones			

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

Director name	
Not applicable	

#### Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year
Not applicable	

**Funds held as custodian trustees on behalf of others**

Description of the assets held in this capacity	Not applicable
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	Not applicable
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	Not applicable

**Additional information (optional)**

**Names and addresses of advisers (Optional information)**

Type of adviser	Name	Address
Legal	AJ Lutley	Springfield, Rookery Hill, Ashtead KT21 1HY

**Name of chief executive or names of senior staff members (Optional information)**

Not applicable

**Exemptions from disclosure**

Reason for non-disclosure of key personnel details

Not applicable

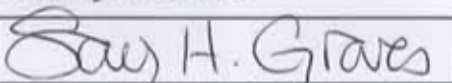
**Other optional information**

Not applicable

**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)	Sally Hilary Groves MBE	
Position (eg Secretary, Chair, etc)	Chair	

Date 14/01/2025



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Charity Name  
**The Peter Maxwell Davies Trust**

No (if any)  
1171985

**CC16a**

**Receipts and payments accounts**

For the period from **01/01/2024** To **31/12/2024**

**Section A Receipts and payments**

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Donations received	-	-	-	-	-
Sale of surplus items	-	-	-	-	-
Contribution to costs	-	-	-	-	-
Gift Aid tax claim	-	-	-	-	-
Royalties	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	-	-	-	-	-
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total receipts</b>	-	-	-	-	-
<b>A3 Payments</b>					
Grants	-	-	-	-	1,858
Trustees' expenses	-	-	-	-	-
Administration expenses	250	-	-	250	330
Website	1,000	-	-	1,000	1,000
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	1,250	-	-	1,250	3,188
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total payments</b>	1,250	-	-	1,250	3,188
<b>Net of receipts/(payments)</b>	- 1,250	-	-	- 1,250	- 3,188
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	25,066	-	-	25,066	-
<b>Cash funds this year end</b>	23,816	-	-	23,816	25,066

## Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Cash at bank	23,816	-	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	23,816	-	-
(agree balances with receipts and payments account(s))				

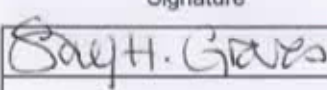
Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Sally Groves	13/01/25



**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, 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:**

*A. Lally*

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

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**THE PETER MAXWELL DAVIES TRUST**

England & Wales - Charity number 1171965

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# Accounts

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## Trustees' Annual Report for the period

From 1 January 2023 To 31 December 2023

Charity name: The Peter Maxwell Davies Trust

Charity registration number: 1171965

### Objectives and Activities

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		<p>responsibility for the Trust's website, MaxOpus, for a fee of £1,000.00.</p> <p>The Trust continued to work closely with the PMD Research Group on their regular zoom Forums, where invited guests shared their experience of working with the composer. These have fed into the vital ongoing research into the life and music of Sir Peter Maxwell Davies by the two eminent scholars Dr Nicholas Jones and Dr Richard McGregor.</p> <p>Liaison with Sir Peter Maxwell Davies' three publishers and enquiries about the composer's music is ongoing.</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have had regard to 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	To preserve the legacy of the composer, through research, recordings and other musical activities in his name.
Policy on social investment including program related investment	Para 1.38	To fund projects outside London which promote greater musical engagement: Music in unusual places.
Contribution made by volunteers	Para 1.38	Not applicable
Other		Not applicable

## 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	See 'Summary of the main activities' above.  These achievements have increased the knowledge and understanding of the public in music and the arts in general and the works of Peter Maxwell Davies in particular and the heritage he left behind and thereby enhanced their cultural well-being.

### 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		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The Trust was in a healthy financial position at the end of the year with sufficient funds to meet its anticipated administration costs and prospective grant funding for the foreseeable future.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Reserves are not considered necessary.
Amount of reserves held	Para 1.22	£0
Reasons for holding zero reserves	Para 1.22	Not considered necessary
Details of fund materially in deficit	Para 1.24	Not applicable
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	The trustees do not consider that there are any such uncertainties.

**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	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charitable Incorporated Organisation
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	Trustees are selected by the existing trustees

**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	The Peter Maxwell Davies Trust
Other name the charity uses	The Max Trust
Registered charity number	1171965
Charity's principal address	50 Walkerscroft Mead London SE21 8LJ

### 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	Sally Hilary Groves MBE	Chair		
2	Sylvia Gowan Junge			
3	Christopher Austin			
4	Dr Nicholas James Jones			

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

Director name		
Not applicable		

### Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
Not applicable		

### Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	Not applicable
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	Not applicable
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	Not applicable

**Additional information (optional)**

**Names and addresses of advisers (Optional information)**

Type of adviser	Name	Address
Legal	AJ Lutley	Springfield, Rookery Hill, Ashted KT21 1HY

**Name of chief executive or names of senior staff members (Optional information)**

Not applicable

**Exemptions from disclosure**

Reason for non-disclosure of key personnel details

Not applicable

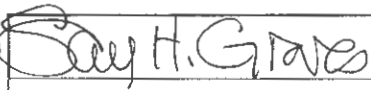
**Other optional information**

Not applicable

**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)	Sally Hilary Groves MBE	
Position (eg Secretary, Chair, etc)	Chair	
Date	27/01/2024	



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Charity Name  
**The Peter Maxwell Davies Trust**

No (if any)  
1171965

CC16a

## Receipts and payments accounts

For the period from	Period start date 01/01/2023	To	Period end date 31/12/2023
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Donations received	-	-	-	-	-
Sale of surplus items	-	-	-	-	-
Contribution to costs	-	-	-	-	-
Gift Aid tax claim	-	-	-	-	-
Royalties	-	-	-	-	84
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	-	-	-	-	84
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total receipts</b>	-	-	-	-	84
<b>A3 Payments</b>					
Grants	1,858	-	-	1,858	1,200
Trustees' expenses	-	-	-	-	-
Administration expenses	330	-	-	330	1,360
Website	1,000	-	-	1,000	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	3,188	-	-	3,188	2,560
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total payments</b>	3,188	-	-	3,188	2,560
<b>Net of receipts/(payments)</b>	- 3,188	-	-	- 3,188	- 2,476
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	28,254	-	-	28,254	-
<b>Cash funds this year end</b>	25,066	-	-	25,066	2,476

## Section B Statement of assets and liabilities at the end of the period

	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>			
Cash at bank	25,066	-	-
	-	-	-
	-	-	-
<b>Total cash funds</b>	<b>25,066</b>	<b>-</b>	<b>-</b>

(agree balances with receipts and payments account(s))

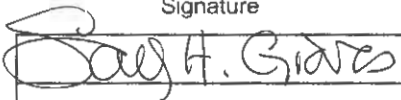
	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>			
Details	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>			
Details		-	-
		-	-
		-	-
		-	-
		-	-

	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>			
Details		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>			
Details		-	
		-	
		-	
		-	

Signed by one or two trustees on behalf of all the trustees

Signature 	Print Name Sally Groves	Date of approval 27/01/2024
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Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name  
The Peter Maxwell Davies Trust

On accounts for the year ended

31 December 2023

Charity no (if any)

1171965

Set out on pages

1-2

(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 31/12/2023.

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:

*A. Lutley*

Date:

27 January 2024

Name:

Andrew John Lutley

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

**Address:** Springfield, Rookery Hill, Ashted, Surrey KT21 1HY


**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.**

Not applicable
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**THE PETER MAXWELL DAVIES TRUST**

England & Wales - Charity number 1171965

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# Accounts

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Charity name

Charity number (if any)

For the period from (start date)

to (end date)

Section A	Receipts and payments				
	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Donations received	0			0	0
Sale of surplus items	0			0	0
Contribution to costs	0			0	0
Gift Aid tax claim	0			0	4,940
Royalties	84			84	0
<i>Sub total</i>	84			84	4,940
<b>A2 Asset and investment sales, etc</b>	0			0	0
<i>Total receipts</i>	84			84	4,940
<b>A3 Payments</b>					
Grants	1,200			1,200	0
Trustees' expenses	0			0	356
Administration expenses	1,360			1,360	713
<i>Sub total</i>	2,560			2,560	1,069
<b>A4 Asset and investment purchases, etc</b>	0			0	0
<i>Total payments</i>	2,560			2,560	1,069
<i>Net of receipts/(payments)</i>	(2,476)			(2,476)	3,870
<b>A5 Transfers between funds</b>	0			0	0
<b>A6 Cash funds last year end</b>	30,731			30,731	26,860
<i>Cash funds this year end</i>	28,254			28,254	30,731

**Section B**

**Statement of assets and liabilities at the end of the period**

	Details	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
<b>B1 Cash funds</b>	Cash at bank	28,254		
	<i>Total cash funds (agree balances with receipts and payments account(s))</i>	28,254		

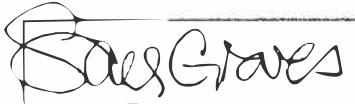
	Details	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
<b>B2 Other monetary assets</b>	None			

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>	None			

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>	None			

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>	None			

Signed by one or two trustees on behalf of all the trustees

Signature	Print name	Date of approval
	SALLY GROVES	18/01/22



## **Trustees' Annual Report for the period**

**From 1 January 2022 To 31 December 2022**

**Charity name: The Peter Maxwell Davies Trust**

**Charity registration number: 1171965**

### **Objectives and Activities**

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance the education of the public in the art of music and in particular the promotion of public education in and appreciation of the life and works of Peter Maxwell Davies.
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	<p>2022 was still overshadowed in the performing arts world by the long-term effects of the pandemic. Audiences were significantly down, programming was cautious and tended towards the conservative. This affected the Trust's activities in several ways, with some plans being cancelled and others remaining in suspense.</p> <p>The Trust's website was tended and developed by Gabriel Williams at the Royal Academy of Music. It brings requests for information which are dealt with by the trustees.</p> <p>The trustees continue to work with Peter Maxwell Davies' various publishers, particularly deciding whether to give permission to make new versions of works, agreeing to staged performances and overseeing publication of unpublished works.</p> <p>The trustees supported the trumpet player Lucy Humphris in her project to make a documentary film about the composer's Litany, to accompany her commercial recording of the work to be released later this year (2023). It is an extremely poetic film capturing the spirit of the Orkneys, where the composer lived and worked for most of his lifetime. It will be added to the website.</p>

		<p>The trustees continued to work with the PMD Research Group, founded by one of the trustees, Dr Nicholas Jones of Cardiff University. Several forums were held online during 2022 and the research archive is being steadily enriched.</p> <p>The major recording project for the UK label NMC with the Danish ensemble Athelas remains on hold, but it is hoped that it will be realised in 2023. Denmark was as affected as the UK by the pandemic, which meant that ensembles were not able to rehearse or give public performances for months. The management of Athelas was also reconstituted during this period and discussions are now ongoing with the new artistic director.</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have had regard to 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	To preserve the legacy of the composer, through research, recordings and other musical activities in his name.
Policy on social investment including program related investment	Para 1.38	To fund projects outside London which promote greater musical engagement: Music in unusual places.
Contribution made by volunteers	Para 1.38	Not applicable
Other		Not applicable

## 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	See 'Summary of the main activities' above.  These achievements have increased the knowledge and understanding of the public in music and the arts in general and the works of Peter Maxwell Davies in particular and the heritage he left behind and thereby enhanced their cultural well-being.

### 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		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The Trust was in a healthy financial position at the end of the year with sufficient funds to meet its anticipated administration costs and prospective grant funding for the foreseeable future.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Reserves are not considered necessary.
Amount of reserves held	Para 1.22	£0
Reasons for holding zero reserves	Para 1.22	Not considered necessary
Details of fund materially in deficit	Para 1.24	Not applicable
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	The trustees do not consider that there are any such uncertainties.

**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	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charitable Incorporated Organisation
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	Trustees are selected by the existing trustees

**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	The Peter Maxwell Davies Trust
Other name the charity uses	The Max Trust
Registered charity number	1171965
Charity's principal address	50 Walkerscroft Mead London SE21 8LJ

### 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	Sally Hilary Groves MBE	Chair		
2	Sylvia Gowan Junge			
3	Christopher Austin			
4	Dr Nicholas James Jones			

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

Director name		
Not applicable		

### Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
Not applicable		

### Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	Not applicable
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	Not applicable
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	Not applicable

**Additional information (optional)**

**Names and addresses of advisers (Optional information)**

Type of adviser	Name	Address
Legal	AJ Lutley	Springfield, Rookery Hill, Ashtead KT21 1HY

**Name of chief executive or names of senior staff members (Optional information)**

Not applicable

**Exemptions from disclosure**

Reason for non-disclosure of key personnel details

Not applicable


**Other optional information**

Not applicable

**Declarations**

The trustees declare that they have approved the trustees' report above.

**Signed on behalf of the charity's trustees**

<b>Signature(s)</b>		
<b>Full name(s)</b>	Sally Hilary Groves MBE	
<b>Position (eg Secretary, Chair, etc)</b>	Chair	
<b>Date</b>	20 January 2023	

**THE PETER MAXWELL DAVIES TRUST**

England & Wales - Charity number 1171965

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# Accounts

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Charity name

Charity number (if any)

For the period from (start date)

to (end date)

**Section A Receipts and payments**

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Donations received	0			0	50
Sale of surplus items	0			0	0
Contribution to costs	0			0	0
Gift Aid tax claim	4,940			4,940	0
<i>Sub total</i>	4,940			4,940	50
<b>A2 Asset and investment sales, etc</b>	0			0	0
<i>Total receipts</i>	4,940			4,940	50
<b>A3 Payments</b>					
Grants	0			0	0
Trustees' expenses	356			356	0
Administration expenses	713			713	1,146
<i>Sub total</i>	1,069			1,069	1,146
<b>A4 Asset and investment purchases, etc</b>	0			0	0
<i>Total payments</i>	1,069			1,069	1,146
<i>Net of receipts/(payments)</i>	3,870			3,870	(1,096)
<b>A5 Transfers between funds</b>	0			0	0
<b>A6 Cash funds last year end</b>	26,860			26,860	27,956
<i>Cash funds this year end</i>	30,731			30,731	26,860

**Section B**

**Statement of assets and liabilities at the end of the period**

	Details	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
<b>B1 Cash funds</b>	Cash at bank	30,731		
	<i>Total cash funds (agree balances with receipts and payments account(s))</i>	30,731		

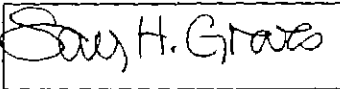
	Details	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
<b>B2 Other monetary assets</b>	None			

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>	None			

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>	None			

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>	None			

Signed by one or two trustees on behalf of all the trustees

Signature	Print name	Date of approval
	SALLY H. GROVES	02/02/22



## Trustees' Annual Report for the period

From 1 January 2021 To 31 December 2021

Charity name: The Peter Maxwell Davies Trust

Charity registration number: 1171965

### Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance the education of the public in the art of music and in particular the promotion of public education in and appreciation of the life and works of Peter Maxwell Davies.
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	<p>The year 2021 was still dominated by the pandemic COVID19 and the new variant Omicrom, which affected live music making and recording plans for most of the year. So many plans collapsed or were postponed.</p> <p>The Trust was closely involved with the setting up of the PMD Research Network, set up by Dr Nicholas Jones, based at Cardiff University. Dr Jones is now a Trustee. A Study Day, planned by Dr Jones for March 2020 and postponed twice during the year, eventually took place at Cardiff University on 4 December 2021. Two other Trustees were also present and one, Sylvia Junge, gave a paper which was warmly received. Two concerts presented works by Peter Maxwell Davies, including seven world premieres, which are an important addition to the oeuvre and are being discussed with the BBC and for a recording (see below).</p> <p>The Trust worked on a major recording project with the Danish ensemble Athelas, to feature a sequence of previously unrecorded works including the outstanding ensemble piece A Mirror of Whitening Light. The funding will come jointly from the Trust and Athelas, with support from Danish Radio. This was scheduled for the last week of January 2021 but has had to be postponed yet again as Denmark is still in total shutdown.</p>

		The Trust continued to develop the website themaxtrust.org, which has received much praise. In December 2021 a postgraduate student at the Royal Academy of Music was appointed to develop and enrich the website, in particular to boost social media emanating from the Trust and to seek out and add personal reminiscences of the composer while they are still able to do so. The Trust dealt with many enquiries, including permissions requests from the composer's publishers and general requests from the public seeking information.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have had regard to 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	To preserve the legacy of the composer, through research, recordings and other musical activities in his name.
Policy on social investment including program related investment	Para 1.38	To fund projects outside London which promote greater musical engagement: Music in unusual places.
Contribution made by volunteers	Para 1.38	Not applicable
Other		Not applicable

### 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	See 'Summary of the main activities' above.  These achievements have increased the knowledge and understanding of the public in music and the arts in general and the works of Peter Maxwell Davies in particular and the heritage he left behind and thereby enhanced their cultural well-being.
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### 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	
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### Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The Trust was in a healthy financial position at the end of the year with sufficient funds to meet its anticipated administration costs and prospective grant funding for the foreseeable future.
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Details of fund materially in deficit	Para 1.24	Not applicable
Explanation of any uncertainties about the	Para 1.23	The trustees do not consider that there are any such uncertainties.

charity continuing as a going concern		
---------------------------------------	--	--

### 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	Constitution
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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	Trustees are selected by the existing trustees

### 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	The Peter Maxwell Davies Trust
Other name the charity uses	The Max Trust
Registered charity number	1171965
Charity's principal address	50 Walkerscroft Mead London SE21 8LJ

## 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	Sally Hilary Groves	Chair		
2	Sylvia Gowan Junge			
3	Christopher Austin			
4	Nicholas James Jones			

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

Director name	
Not applicable	

## Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year
Not applicable	

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	Not applicable
Name and objects of the charity on whose behalf the	Not applicable

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	Not applicable

**Additional information (optional)**

**Names and addresses of advisers (Optional information)**

Type of adviser	Name	Address
Legal	AJ Lutley	Springfield, Rookery Hill, Ashted KT21 1HY

**Name of chief executive or names of senior staff members (Optional information)**

Not applicable

**Exemptions from disclosure**

Reason for non-disclosure of key personnel details

Not applicable

**Other optional information**

Not applicable

**Declarations**

The trustees declare that they have approved the trustees' report above.

**Signed on behalf of the charity's trustees**

Signature(s)	<i>Sally H. Groves</i>	
Full name(s)	Sally Hilary Groves MBE	
Position (eg Secretary, Chair, etc)	Chair	

Date 2 Feb 2022