

# LOTUS PARTNERS FOUNDATION

England & Wales · Charity number 1174605

## Details

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|             |   |
|-------------|---|
| Other names | THE LOTUS FOUNDATION                                    |
| Status      | Registered  |
| Legal form  | CIO   |
| Registered  | 2017-09-12  |
| Register    | <a href="#">View on the Charity Commission register</a> |

## Contact

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|         |  |
|---------|--|
| Address | 45 Chatsworth Road<br>London<br>W5 3DD   |
| Phone   | 01784443807  |
| Email   | <a href="mailto:admin@LotusPartnersFoundation.org">admin@LotusPartnersFoundation.org</a> |
| Website | <a href="http://www.LotusPartnersFoundation.org">www.LotusPartnersFoundation.org</a>     |

## Activities

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**Objects:** TO FURTHER SUCH CHARITABLE PURPOSES (CHARITABLE UNDER ENGLISH LAW) AS THE TRUSTEES SEE FIT FROM TIME TO TIME IN PARTICULAR BUT NOT LIMITED TO THE ADVANCEMENT OF HEALTH OR THE SAVING OF LIVES, THE ADVANCEMENT OF ANIMAL WELFARE, THE RELIEF OF THOSE IN NEED BY REASON OF ILL-HEALTH, DISABILITY, FINANCIAL HARDSHIP OR OTHER DISADVANTAGE FOR THE PUBLIC BENEFIT BY THE PROVISION OF ADVICE, SUPPORT AND GRANTS TO INDIVIDUALS AND REGISTERED, EXCEPTED AND EXEMPT CHARITIES WITH A PARTICULAR FOCUS ON EUROPE AND SOUTH-EAST ASIA

**Activities:** To further such charitable purposes as the trustees see fit from time to time in particular but not limited to the advancement of health, saving of lives, animal welfare, relief of those in need by reason of ill-health, disability, financial hardship or other disadvantage for the public benefit by the provision of advice, support and grants with a particular focus on Europe and South-East Asia.

## Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Provides Other Finance, Provides Services, Provides Advocacy/advice/information, Sponsors Or Undertakes Research, Acts As An Umbrella Or Resource Body
- **What:** General Charitable Purposes, Education/training, The Advancement Of Health Or Saving Of Lives, Disability, The Prevention Or Relief Of Poverty, Religious Activities, Arts/culture/heritage/science, Animals, Environment/conservation/heritage, Economic/community Development/employment, Armed Forces/emergency Service Efficiency, Human Rights/religious Or Racial Harmony/equality Or Diversity, Recreation
- **Who:** Children/young People, Elderly/old People, People With Disabilities, People Of A Particular Ethnic Or Racial Origin, Other Charities Or Voluntary Bodies, The General Public/mankind

## Geography

- India
- Indonesia
- Mauritius
- Nepal
- Throughout England And Wales

## Finances

| Period end | Income  | Expenditure | Assets | Employees |
|------------|---------|-------------|--------|-----------|
| 2025-03-31 | £15,000 | £3,111      | -      | -         |
| 2024-03-31 | £7,019  | £8,460      | -      | -         |
| 2023-03-31 | £15,005 | £6,236      | -      | -         |
| 2022-03-31 | £5      | £8,810      | -      | -         |
| 2021-03-31 | £16,025 | £6,551      | -      | -         |

## Trustees

| Name                           | Role  | Appointed  |
|--------------------------------|-------|------------|
| <b>Professor PANKAJ SHARMA</b> | Chair | 2017-09-12 |
| AARTI RANI SHARMA              |       | 2017-09-12 |
| Dr SAPNA DEVI SHARMA MD        |       | 2017-09-12 |
| Shyam Sunder Sharma            |       | 2019-03-16 |

**LOTUS PARTNERS FOUNDATION**

England & Wales - Charity number 1174605

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# Accounts

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# Trustees' Annual Report for the period

|             |                   |        |          |           |                 |        |          |
|-------------|-------------------|--------|----------|-----------|-----------------|--------|----------|
| <b>From</b> | Period start date |        |          | <b>To</b> | Period end date |        |          |
|             | Day1              | Month4 | Year2024 |           | Day31           | Month3 | Year2025 |

## Section A Reference and administration details

**Charity name**

Lotus Partners Foundation

**Other names charity is known by**

**Registered charity number (if any)**

1174605

**Charity's principal address**

45 Chatsworth Rd

London

**Postcode**

W5 3DD

### 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 | Prof Pankaj Sharma     |                 |                                   |   |
| 2 | Dr Sapna Devi Sharma   |                 |                                   |   |
| 3 | Dr Aarti Rani Sharma   |                 |                                   |   |
| 4 | Mr Shyam Sunder Sharma |                 |                                   |   |
| 5 |                        |                 |                                   |   |
| 6 |                        |                 |                                   |   |
| 7 |                        |                 |                                   |   |

### Names of the trustees for the charity, if any, (for example, any custodian trustees)

| Name | Dates acted if not for whole year |
|------|-----------------------------------|
|      |                                   |
|      |                                   |
|      |                                   |

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

| Type of adviser                                 | Name          | Address                             |
|---|---------------|-------------------------------------|
| <b>Independent external advisor to Trustees</b> | Dr Isaac John | St Peters Hospital, Chertsey Surrey |
|   |               |                                     |
|   |               |                                     |

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

|  |
|--|
|  |
|--|

## Section B Structure, governance and management

### Description of the charity's trusts

|   |  |
|---|--|
| Type of governing document<br>(eg. trust deed, constitution)        | Constitution (CIO)                         |
| How the charity is constituted<br>(eg. trust, association, company) | Charitable Incorporated Organisation (CIO) |
| Trustee selection methods<br>(eg. appointed by, elected by)         | Appointed                                  |

### Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

|  |
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## Section C Objectives and activities

### Summary of the objects of the charity set out in its governing document

To undertake charitable funding and support for all aspects of human health, education, medical and scientific research and animal welfare along with supporting the elderly and vulnerable, environmental and religious rights principally in Europe and Southeast Asia.

To further such charitable purposes as the trustees see fit from time to time in particular but not limited to the advancement of health or the saving of lives, the advancement of animal welfare, the relief of those in need by reason of ill-health, disability, financial hardship or other disadvantage for the public benefit by the provision of advice, support and grants to individuals and registered, excepted and exempt charities with a particular focus on Europe and South-East Asia.

**Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)**

**Additional details of objectives and activities (Optional information)**

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

**Summary of the main achievements of the charity during the year**

Raising income remains challenging but has now allowed us to begin distributing albeit cautiously.

Thus, we are pleased to report that we have distributed 11% of our funds over this year, and 18% of our received income for this year.

Administration costs at 1% remain well below our target of 20%.

Funds have been distributed in accordance with the objectives of the charities particularly focusing on smaller institutions where a relatively small amount of money can have a big impact.

Our website [LotusPartnersFoundation.org](http://LotusPartnersFoundation.org) contains the institutions to whom money was distributed and a non-exhaustive list is below:

- Gonville & Caius College, University of Cambridge
- Plan International
- Bhaktivedanta Manor Temple
- Food For Life Vrindavan
- Royal College of Physicians (for international work)
- Sher Jung Foundation

## Section E Financial review

### Brief statement of the charity's policy on reserves

Funds will continue to be distributed in the new financial year if income is sufficient to fund our commitments to charitable organisations in accordance with our charity objectives.

### Details of any funds materially in deficit

### Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

## Section F Other optional information

## Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s)



Full name(s)

Professor Pankaj Sharma

Position (eg Secretary, Chair, etc)

Chair

Date

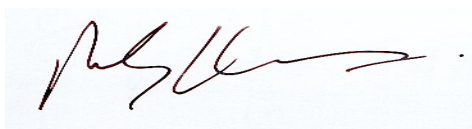
18.08.25

## **LOTUS PARTNERS FOUNDATION**

### **STATEMENT OF FINANCIAL ACTIVITIES**

#### **YEAR ENDED 31 March 2025**

|                                      | Unrestricted<br>£ | Restricted<br>£ | 2024 Total<br>£ | 2025 Total<br>£ |
|--------------------------------------|-------------------|-----------------|-----------------|-----------------|
| <b>Incoming Resources</b>            |                   |                 |                 |                 |
| Grants, Donations, Sales etc.        | 15000             | -               | 7019            | 15000           |
| Bank Interest                        | 0                 | -               | 0               | 0               |
| <b>Total Incoming Resources</b>      | <b>15000</b>      | <b>-</b>        | <b>7019</b>     | <b>15000</b>    |
| <br>                                 |                   |                 |                 |                 |
| <b>Direct Charitable Expenditure</b> |                   |                 |                 |                 |
| Core Work                            | 377               | -               | 0               | 377             |
| <br>                                 |                   |                 |                 |                 |
| <b>Other Expenditure</b>             |                   |                 |                 |                 |
| Fundraising, Publicity, Admin        | 528               | -               | 528             | 0               |
| <b>Total Resources Expended</b>      | <b>3111</b>       | <b>-</b>        | <b>8460</b>     | <b>3111</b>     |
| <br>                                 |                   |                 |                 |                 |
| Net Incoming/(Outgoing)<br>Resources | 11889             | -               | (1441)          | 11889           |
| <br>                                 |                   |                 |                 |                 |
| <b>Funds as at 1 April 2024</b>      | <b>13935</b>      | <b>0</b>        |                 |                 |
| <br>                                 |                   |                 |                 |                 |
| <b>Funds as at 31 March 2025</b>     | <b>25824</b>      | <b>0</b>        |                 |                 |



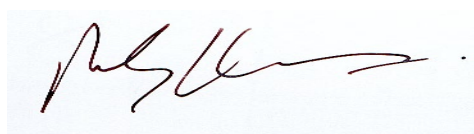
**Prof. Pankaj Sharma - Chairman**

**Signed on behalf of the Board of Trustees**

## **LOTUS PARTNERS FOUNDATION**

### **BALANCE SHEET AS AT 31 MARCH 2025**

|  | <b><u>2024</u></b> | <b><u>2025</u></b> |
|--|--------------------|--------------------|
|  | £                  | £                  |
| <b>Fixed Assets</b>                                    | 0                  | 0                  |
| <b>Current Assets</b>                                  |                    |                    |
| Debtors  | 0                  | 0                  |
| Cash at Bank   | <u>13935</u>       | <u>25824</u>       |
| <b>TOTAL</b>   | <b>13935</b>       | <b>25824</b>       |
| <b>Creditors – Amounts falling due within one year</b> | <u>0</u>           | <u>0</u>           |
| <b>Net Current Assets</b>                              | <b>13935</b>       | <b>25824</b>       |
| <b>Funds</b>   |                    |                    |
| Unrestricted Funds                                     | 13935              | 25824              |
| Restricted Funds                                       | <u>0</u>           | <u>0</u>           |
|  | <b>13935</b>       | <b>25824</b>       |



**Prof. Pankaj Sharma - Chairman**

**Signed on behalf of the Board of Trustees**

**18.8.25**

## **LOTUS PARTNERS FOUNDATION**

### **BALANCE SHEET AS AT 31 MARCH 2025**

#### **1. ACCOUNTING POLICIES**

##### **General**

The Financial Statements have been prepared under the Historical Cost Convention and in accordance with the applicable accounting standards and the charities SORP (Statement of Recommended Practice: 'Accounting by Charities').

#### **2. Summary of Net Assets by Funds.**

|                    | Unrestricted Funds | Restricted Funds | Total         |
|--------------------|--------------------|------------------|---------------|
| Net Current Assets | <u>£25824</u>      | <u>£0</u>        | <u>£25824</u> |

##### **Additional Notes:**

**none**

**LOTUS PARTNERS FOUNDATION**

England & Wales - Charity number 1174605

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# Accounts

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# Trustees' Annual Report for the period

|             |                   |        |          |           |                 |        |          |
|-------------|-------------------|--------|----------|-----------|-----------------|--------|----------|
| <b>From</b> | Period start date |        |          | <b>To</b> | Period end date |        |          |
|             | Day1              | Month4 | Year2023 |           | Day31           | Month3 | Year2024 |

## Section A Reference and administration details

**Charity name**

Lotus Partners Foundation

**Other names charity is known by**

**Registered charity number (if any)**

1174605

**Charity's principal address**

45 Chatsworth Rd  
 London  
 Postcode **W5 3DD**

### 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 | Prof Pankaj Sharma     |                 |                                   |   |
| 2 | Dr Sapna Devi Sharma   |                 |                                   |   |
| 3 | Ms Aarti Rani Sharma   |                 |                                   |   |
| 4 | Mr Shyam Sunder Sharma |                 |                                   |   |
| 5 |                        |                 |                                   |   |
| 6 |                        |                 |                                   |   |
| 7 |                        |                 |                                   |   |

### Names of the trustees for the charity, if any, (for example, any custodian trustees)

| Name | Dates acted if not for whole year |
|------|-----------------------------------|
|      |                                   |
|      |                                   |
|      |                                   |

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

| Type of adviser                          | Name          | Address                             |
|--|---------------|-------------------------------------|
| Independent external advisor to Trustees | Dr Isaac John | St Peters Hospital, Chertsey Surrey |
|  |               |                                     |
|  |               |                                     |

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

## Section B Structure, governance and management

### Description of the charity's trusts

|   |  |
|---|--|
| Type of governing document<br>(eg. trust deed, constitution)        | Constitution (CIO)                         |
| How the charity is constituted<br>(eg. trust, association, company) | Charitable Incorporated Organisation (CIO) |
| Trustee selection methods<br>(eg. appointed by, elected by)         | Appointed                                  |

### Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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## Section C Objectives and activities

### Summary of the objects of the charity set out in its governing document

To undertake charitable funding and support for all aspects of human health, education, medical and scientific research and animal welfare along with supporting the elderly and vulnerable, environmental and religious rights principally in Europe and Southeast Asia.

To further such charitable purposes as the trustees see fit from time to time in particular but not limited to the advancement of health or the saving of lives, the advancement of animal welfare, the relief of those in need by reason of ill-health, disability, financial hardship or other disadvantage for the public benefit by the provision of advice, support and grants to individuals and registered, excepted and exempt charities with a particular focus on Europe and South-East Asia.

**Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)**

**Additional details of objectives and activities (Optional information)**

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

**Summary of the main achievements of the charity during the year**

The charity has overcome a previous challenging time nationally and internationally, not unlike other charities operating in a Covid environment.

However, raising income remains challenging but has now allowed us to begin distributing albeit cautiously.

Thus, we are pleased to report that we have distributed 57% of our funds over this year, and 113% of our received income for this year.

Administration costs at 4% remain well below our target of 20%.

Funds have been distributed in accordance with the objectives of the charities particularly focusing on smaller institutions where a relatively small amount of money can have a big impact.

Our website [LotusPartnersFoundation.org](http://LotusPartnersFoundation.org) contains the institutions to whom money was distributed and some are listed below:

- Gonville & Caius College, University of Cambridge
- Plan International
- Bhaktivedanta Manor Temple
- Food For Life Vrindavan
- St Paul's School
- Royal College of Physicians (for international work)
- Sher Jung Foundation

## Section E

## Financial review

### Brief statement of the charity's policy on reserves

Funds will continue to be distributed in the new financial year if income is sufficient to fund our commitments to charitable organisations in accordance with our charity objectives.

### Details of any funds materially in deficit

### Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

## Section F

## Other optional information

## Section G

## Declaration

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

Signed on behalf of the charity's trustees

Signature(s)



Full name(s)

Professor Pankaj Sharma

Position (eg Secretary, Chair, etc)

Chair

Date

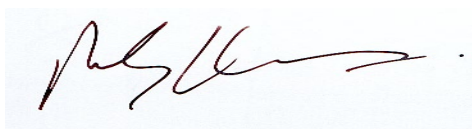
2.11.24

## **LOTUS PARTNERS FOUNDATION**

### **STATEMENT OF FINANCIAL ACTIVITIES**

#### **YEAR ENDED 31 March 2024**

|                                      | Unrestricted<br>£ | Restricted<br>£ | 2023 Total<br>£ | 2024 Total<br>£ |
|--------------------------------------|-------------------|-----------------|-----------------|-----------------|
| <b>Incoming Resources</b>            |                   |                 |                 |                 |
| Grants, Donations, Sales etc.        | 7019              | -               | 15005           | 7019            |
| Bank Interest                        | 0                 | -               | 0               | 0               |
| <b>Total Incoming Resources</b>      | <b>7019</b>       | <b>-</b>        | <b>15005</b>    | <b>7019</b>     |
| <br>                                 |                   |                 |                 |                 |
| <b>Direct Charitable Expenditure</b> |                   |                 |                 |                 |
| Core Work                            | 0                 | -               | 0               | 0               |
| <br>                                 |                   |                 |                 |                 |
| <b>Other Expenditure</b>             |                   |                 |                 |                 |
| Fundraising, Publicity, Admin        | 528               | -               | 988             | 528             |
| <b>Total Resources Expended</b>      | <b>8460</b>       | <b>-</b>        | <b>6236</b>     | <b>8460</b>     |
| <br>                                 |                   |                 |                 |                 |
| Net Incoming/(Outgoing)<br>Resources | (1441)            | -               | 8769            | (1441)          |
| <br>                                 |                   |                 |                 |                 |
| <b>Funds as at 1 April 2022</b>      | <b>15376</b>      | <b>0</b>        |                 |                 |
| <br>                                 |                   |                 |                 |                 |
| <b>Funds as at 31 March 2023</b>     | <b>13935</b>      | <b>0</b>        |                 |                 |



**Prof. Pankaj Sharma - Chairman**

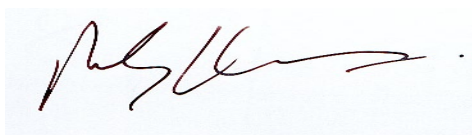
**Signed on behalf of the Board of Trustees**

**2.11.24**

## **LOTUS PARTNERS FOUNDATION**

### **BALANCE SHEET AS AT 31 MARCH 2023**

|  | <b><u>2023</u></b> | <b><u>2024</u></b> |
|--|--------------------|--------------------|
|  | £                  | £                  |
| <b>Fixed Assets</b>                                    | 0                  | 0                  |
| <b>Current Assets</b>                                  |                    |                    |
| Debtors  | 0                  | 0                  |
| Cash at Bank   | <u>15376</u>       | <u>13935</u>       |
| <b>TOTAL</b>   | <b>15376</b>       | <b>13935</b>       |
| <b>Creditors – Amounts falling due within one year</b> | <u>0</u>           | <u>0</u>           |
| <b>Net Current Assets</b>                              | <b>15376</b>       | <b>13935</b>       |
| <b>Funds</b>   |                    |                    |
| Unrestricted Funds                                     | 15376              | 13935              |
| Restricted Funds                                       | <u>0</u>           | <u>0</u>           |
|  | <b>15376</b>       | <b>13935</b>       |



**Prof. Pankaj Sharma - Chairman**

**Signed on behalf of the Board of Trustees**

**2.11.24**

## **LOTUS PARTNERS FOUNDATION**

### **BALANCE SHEET AS AT 31 MARCH 2024**

#### **1. ACCOUNTING POLICIES**

##### **General**

The Financial Statements have been prepared under the Historical Cost Convention and in accordance with the applicable accounting standards and the charities SORP (Statement of Recommended Practice: 'Accounting by Charities').

#### **2. Summary of Net Assets by Funds.**

|                    | Unrestricted Funds | Restricted Funds | Total         |
|--------------------|--------------------|------------------|---------------|
| Net Current Assets | <u>£13935</u>      | <u>£0</u>        | <u>£13935</u> |

##### **Additional Notes:**

none

**LOTUS PARTNERS FOUNDATION**

England & Wales - Charity number 1174605

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# Accounts

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# Trustees' Annual Report for the period

|             |                   |        |          |           |                 |        |          |
|-------------|-------------------|--------|----------|-----------|-----------------|--------|----------|
| <b>From</b> | Period start date |        |          | <b>To</b> | Period end date |        |          |
|             | Day1              | Month4 | Year2022 |           | Day31           | Month3 | Year2023 |

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**Charity name**

Lotus Partners Foundation

**Other names charity is known by**

**Registered charity number (if any)**

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### Names of the charity trustees who manage the charity

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| 1 | Prof Pankaj Sharma     |                 |                                   |   |
| 2 | Dr Sapna Devi Sharma   |                 |                                   |   |
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| 4 | Mr Shyam Sunder Sharma |                 |                                   |   |
| 5 |                        |                 |                                   |   |
| 6 |                        |                 |                                   |   |
| 7 |                        |                 |                                   |   |

### Names of the trustees for the charity, if any, (for example, any custodian trustees)

| Name | Dates acted if not for whole year |
|------|-----------------------------------|
|      |                                   |
|      |                                   |
|      |                                   |

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

| Type of adviser                          | Name          | Address                             |
|--|---------------|-------------------------------------|
| Independent external advisor to Trustees | Dr Isaac John | St Peters Hospital, Chertsey Surrey |
|  |               |                                     |
|  |               |                                     |

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

|  |
|--|
|  |
|--|

## Section B Structure, governance and management

### Description of the charity's trusts

|   |  |
|---|--|
| Type of governing document<br>(eg. trust deed, constitution)        | Constitution (CIO)                         |
| How the charity is constituted<br>(eg. trust, association, company) | Charitable Incorporated Organisation (CIO) |
| Trustee selection methods<br>(eg. appointed by, elected by)         | Appointed                                  |

### Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
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- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

**Summary of the main achievements of the charity during the year**

The charity has overcome a previous challenging time nationally and internationally, not unlike other charities operating in a Covid environment.

However, income has recovered allowing us to begin distributing but cautiously.

Thus, we are pleased to report that we have distributed 21% of our funds. This is lower than the previous 45% but we have built our reserves following a difficult year. Administration costs remain well below our target of 20%.

Funds have been distributed in accordance with the objectives of the charities particularly focusing on smaller institutions where a relatively small amount of money can have a big impact.

Our website [LotusPartnersFoundation.org](http://LotusPartnersFoundation.org) contains the institutions to whom money was given and some are listed below:

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Food For Life Vrindavan

## Section E

## Financial review

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Funds will continue to be distributed in the new financial year if income is sufficient to fund our commitments to charitable organisations, in accordance with the charities objectives.

### Details of any funds materially in deficit

### Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

## Section F

## Other optional information

## Section G

## Declaration

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

Signed on behalf of the charity's trustees

Signature(s)



Full name(s)

Prof Pankaj Sharma

Position (eg Secretary, Chair, etc)

Chair

Date

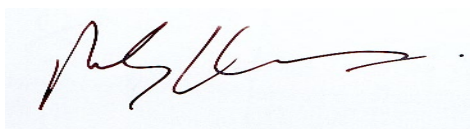
24.09.23

## LOTUS PARTNERS FOUNDATION

### STATEMENT OF FINANCIAL ACTIVITIES

#### YEAR ENDED 31 March 2023

|                                      | Unrestricted<br>£ | Restricted<br>£ | 2022 Total<br>£ | 2023 Total<br>£ |
|--------------------------------------|-------------------|-----------------|-----------------|-----------------|
| <b>Incoming Resources</b>            |                   |                 |                 |                 |
| Grants, Donations, Sales etc.        | 5                 | -               | 5               | 15005           |
| Bank Interest                        | 0                 | -               | 0               | 0               |
| <b>Total Incoming Resources</b>      | <b>5</b>          | <b>-</b>        | <b>5</b>        | <b>15005</b>    |
| <br>                                 |                   |                 |                 |                 |
| <b>Direct Charitable Expenditure</b> |                   |                 |                 |                 |
| Core Work                            | 208               | -               | 0               | 0               |
| <br>                                 |                   |                 |                 |                 |
| <b>Other Expenditure</b>             |                   |                 |                 |                 |
| Fundraising, Publicity, Admin        | 327               | -               | 327             | 988             |
| <b>Total Resources Expended</b>      | <b>8810</b>       | <b>-</b>        | <b>8810</b>     | <b>6236</b>     |
| <br>                                 |                   |                 |                 |                 |
| Net Incoming/(Outgoing)<br>Resources | (8805)            | -               | (8805)          | 8769            |
| <br>                                 |                   |                 |                 |                 |
| <b>Funds as at 1 April 2022</b>      | <b>6607</b>       | <b>0</b>        |                 |                 |
| <br>                                 |                   |                 |                 |                 |
| <b>Funds as at 31 March 2023</b>     | <b>15376</b>      | <b>0</b>        |                 |                 |



Prof. Pankaj Sharma - Chairman

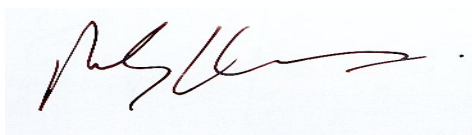
Signed on behalf of the Board of Trustees

24.09.23

## **LOTUS PARTNERS FOUNDATION**

### **BALANCE SHEET AS AT 31 MARCH 2023**

|  | <b><u>2022</u></b> | <b><u>2023</u></b> |
|--|--------------------|--------------------|
|  | £                  | £                  |
| <b>Fixed Assets</b>                                    | 0                  | 0                  |
| <b>Current Assets</b>                                  |                    |                    |
| Debtors  | 0                  | 0                  |
| Cash at Bank   | <u>6607</u>        | <u>15376</u>       |
|  | <b>6607</b>        | <b>15376</b>       |
| <b>Creditors – Amounts falling due within one year</b> | <u>0</u>           | <u>0</u>           |
| <b>Net Current Assets</b>                              | <b>6607</b>        | <b>15376</b>       |
| <b>Funds</b>   |                    |                    |
| Unrestricted Funds                                     | 6607               | 15376              |
| Restricted Funds                                       | <u>0</u>           | <u>0</u>           |
|  | <b>6607</b>        | <b>15376</b>       |



**Prof. Pankaj Sharma - Chairman**

**Signed on behalf of the Board of Trustees**

**24.09.23**

## **LOTUS PARTNERS FOUNDATION**

### **BALANCE SHEET AS AT 31 MARCH 2023**

#### **1. ACCOUNTING POLICIES**

##### **General**

The Financial Statements have been prepared under the Historical Cost Convention and in accordance with the applicable accounting standards and the charities SORP (Statement of Recommended Practice: 'Accounting by Charities').

#### **2. Summary of Net Assets by Funds.**

|                    | Unrestricted Funds | Restricted Funds | Total         |
|--------------------|--------------------|------------------|---------------|
| Net Current Assets | <u>£15376</u>      | <u>£0</u>        | <u>£15376</u> |

##### **Additional Notes:**

**none**

**LOTUS PARTNERS FOUNDATION**

England & Wales - Charity number 1174605

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# Accounts

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# Trustees' Annual Report for the period

|             |                   |        |          |           |                 |        |          |
|-------------|-------------------|--------|----------|-----------|-----------------|--------|----------|
| <b>From</b> | Period start date |        |          | <b>To</b> | Period end date |        |          |
|             | Day1              | Month4 | Year2021 |           | Day31           | Month3 | Year2022 |

## Section A Reference and administration details

**Charity name**

Lotus Partners Foundation

**Other names charity is known by**

**Registered charity number (if any)**

1174605

**Charity's principal address**

45 Chatsworth Rd

London

**Postcode**

W5 3DD

### 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 | Prof Pankaj Sharma     |                 |                                   |   |
| 2 | Dr Sapna Devi Sharma   |                 |                                   |   |
| 3 | Ms Aarti Rani Sharma   |                 |                                   |   |
| 4 | Mr Shyam Sunder Sharma |                 |                                   |   |
| 5 |                        |                 |                                   |   |
| 6 |                        |                 |                                   |   |
| 7 |                        |                 |                                   |   |

### Names of the trustees for the charity, if any, (for example, any custodian trustees)

| Name | Dates acted if not for whole year |
|------|-----------------------------------|
|      |                                   |
|      |                                   |
|      |                                   |

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

| Type of adviser                          | Name          | Address                             |
|--|---------------|-------------------------------------|
| Independent external advisor to Trustees | Dr Isaac John | St Peters Hospital, Chertsey Surrey |
|  |               |                                     |
|  |               |                                     |

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

|  |
|--|
|  |
|--|

## Section B Structure, governance and management

### Description of the charity's trusts

|   |  |
|---|--|
| Type of governing document<br>(eg. trust deed, constitution)        | Constitution (CIO)                         |
| How the charity is constituted<br>(eg. trust, association, company) | Charitable Incorporated Organisation (CIO) |
| Trustee selection methods<br>(eg. appointed by, elected by)         | Appointed                                  |

### Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

|  |
|--|
|  |
|--|

## Section C Objectives and activities

### Summary of the objects of the charity set out in its governing document

To undertake charitable funding and support for all aspects of human health, education, medical and scientific research and animal welfare along with supporting the elderly and vulnerable, environmental and religious rights principally in Europe and South East Asia.

To further such charitable purposes as the trustees see fit from time to time in particular but not limited to the advancement of health or the saving of lives, the advancement of animal welfare, the relief of those in need by reason of ill-health, disability, financial hardship or other disadvantage for the public benefit by the provision of advice, support and grants to individuals and registered, excepted and exempt charities with a particular focus on Europe and South-East Asia.

**Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)**

**Additional details of objectives and activities (Optional information)**

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

**Summary of the main achievements of the charity during the year**

The charity has operated in a challenging time nationally and internationally, not unlike other charities operating in a Covid environment. However, the Trustees felt that distribution of funds should continue despite the income. Thus, we are pleased to report that we have increased the distribution of funds from 40% last year to 45% this year, despite the challenging conditions. A lower administrative cost of 2% was spent.

Funds have been distributed in accordance with the objectives of the charities particularly focusing on smaller institutions where a relatively small amount of money can have a big impact.

Our website [LotusPartnersFoundation.org](http://LotusPartnersFoundation.org) contains the institutions to whom money was given and some are listed below:

Gonville & Caius College, University of Cambridge

Plan International

Bhaktivedanta Manor Temple

Food For Life Vrindavan

DAG India for charitable works

## Section E

## Financial review

### Brief statement of the charity's policy on reserves

The reserves will continue to be distributed in the new financial year if income is sufficient to fund our commitments to charitable organisations, in accordance with the charities objectives.

### Details of any funds materially in deficit

### Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

## Section F

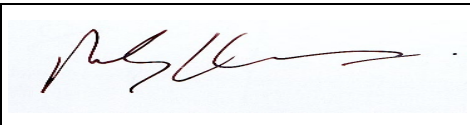
## Other optional information

## Section G

## Declaration

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

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

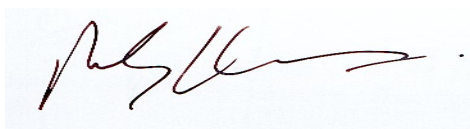
|                                     |   |  |
|-------------------------------------|---|--|
| Signature(s)                        |  |  |
| Full name(s)                        | Prof Pankaj Sharma  |  |
| Position (eg Secretary, Chair, etc) | Chair   |  |
| Date                                | 17.10.22  |  |

## LOTUS PARTNERS FOUNDATION

### STATEMENT OF FINANCIAL ACTIVITIES

#### YEAR ENDED 31 March 2022

|                                      | Unrestricted<br>£ | Restricted<br>£ | 2021 Total<br>£ | 2022 Total<br>£ |
|--------------------------------------|-------------------|-----------------|-----------------|-----------------|
| <b>Incoming Resources</b>            |                   |                 |                 |                 |
| Grants, Donations, Sales etc.        | 5                 | -               | 16025           | 5               |
| Bank Interest                        | 0                 | -               | 0               | 0               |
| <b>Total Incoming Resources</b>      | <b>5</b>          | <b>-</b>        | <b>16025</b>    | <b>5</b>        |
| <br>                                 |                   |                 |                 |                 |
| <b>Direct Charitable Expenditure</b> |                   |                 |                 |                 |
| Core Work                            | 208               | -               | 208             | 0               |
| <br>                                 |                   |                 |                 |                 |
| <b>Other Expenditure</b>             |                   |                 |                 |                 |
| Fundraising, Publicity, Admin        | 327               | -               | 311             | 327             |
| <b>Total Resources Expended</b>      | <b>8810</b>       | <b>-</b>        | <b>6550</b>     | <b>8810</b>     |
| <br>                                 |                   |                 |                 |                 |
| Net Incoming/(Outgoing)<br>Resources | (8805)            | -               | 9475            | (8805)          |
| <br>                                 |                   |                 |                 |                 |
| <b>Funds as at 1 April 2021</b>      | <b>15411</b>      | <b>0</b>        |                 |                 |
| <br>                                 |                   |                 |                 |                 |
| <b>Funds as at 31 March 2022</b>     | <b>6607</b>       | <b>0</b>        |                 |                 |



Prof. Pankaj Sharma - Chairman

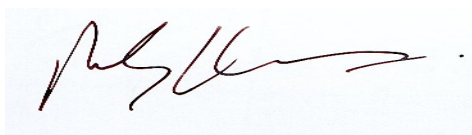
Signed on behalf of the Board of Trustees

17.10.22

## **LOTUS PARTNERS FOUNDATION**

### **BALANCE SHEET AS AT 31 MARCH 2020**

|  | <b><u>2021</u></b> | <b><u>2022</u></b> |
|--|--------------------|--------------------|
|  | £                  | £                  |
| <b>Fixed Assets</b>                                    | 0                  | 0                  |
| <b>Current Assets</b>                                  |                    |                    |
| Debtors  | 0                  | 0                  |
| Cash at Bank   | <u>15411</u>       | <u>6607</u>        |
|  | <b>15411</b>       | <b>6607</b>        |
| <b>Creditors – Amounts falling due within one year</b> | <u>0</u>           | <u>0</u>           |
| <b>Net Current Assets</b>                              | <b>15411</b>       | <b>6607</b>        |
| <b>Funds</b>   |                    |                    |
| Unrestricted Funds                                     | 15411              | 6607               |
| Restricted Funds                                       | <u>0</u>           | <u>0</u>           |
|  | <b>15411</b>       | <b>6607</b>        |



**Prof. Pankaj Sharma - Chairman**

**Signed on behalf of the Board of Trustees**

**17.10.22**

## **LOTUS PARTNERS FOUNDATION**

### **BALANCE SHEET AS AT 31 MARCH 2021**

#### **1. ACCOUNTING POLICIES**

##### **General**

The Financial Statements have been prepared under the Historical Cost Convention and in accordance with the applicable accounting standards and the charities SORP (Statement of Recommended Practice: 'Accounting by Charities').

#### **2. Summary of Net Assets by Funds.**

|                    | Unrestricted Funds | Restricted Funds | Total        |
|--------------------|--------------------|------------------|--------------|
| Net Current Assets | <u>£6607</u>       | <u>£0</u>        | <u>£6607</u> |

##### **Additional Notes:**

none

**LOTUS PARTNERS FOUNDATION**

England & Wales - Charity number 1174605

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# Accounts

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# Trustees' Annual Report for the period

|             |                   |        |          |           |                 |        |          |
|-------------|-------------------|--------|----------|-----------|-----------------|--------|----------|
| <b>From</b> | Period start date |        |          | <b>To</b> | Period end date |        |          |
|             | Day1              | Month4 | Year2020 |           | Day31           | Month3 | Year2021 |

## Section A Reference and administration details

**Charity name**

Lotus Partners Foundation

**Other names charity is known by**

**Registered charity number (if any)**

1174605

**Charity's principal address**

45 Chatsworth Rd  
 London  
 Postcode **W5 3DD**

### 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 | Prof Pankaj Sharma     |                 |                                   |   |
| 2 | Dr Sapna Devi Sharma   |                 |                                   |   |
| 3 | Ms Aarti Rani Sharma   |                 |                                   |   |
| 4 | Mr Shyam Sunder Sharma |                 |                                   |   |
| 5 |                        |                 |                                   |   |
| 6 |                        |                 |                                   |   |
| 7 |                        |                 |                                   |   |

### Names of the trustees for the charity, if any, (for example, any custodian trustees)

| Name | Dates acted if not for whole year |
|------|-----------------------------------|
|      |                                   |
|      |                                   |
|      |                                   |

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

| Type of adviser                          | Name          | Address                             |
|--|---------------|-------------------------------------|
| Independent external advisor to Trustees | Dr Isaac John | St Peters Hospital, Chertsey Surrey |
|  |               |                                     |
|  |               |                                     |

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

## Section B Structure, governance and management

### Description of the charity's trusts

|   |  |
|---|--|
| Type of governing document<br>(eg. trust deed, constitution)        | Constitution (CIO)                         |
| How the charity is constituted<br>(eg. trust, association, company) | Charitable Incorporated Organisation (CIO) |
| Trustee selection methods<br>(eg. appointed by, elected by)         | Appointed                                  |

### Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

|  |
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|--|

## Section C Objectives and activities

### Summary of the objects of the charity set out in its governing document

To undertake charitable funding and support for all aspects of human health, education, medical and scientific research and animal welfare along with supporting the elderly and vulnerable, environmental and religious rights principally in Europe and South East Asia.

To further such charitable purposes as the trustees see fit from time to time in particular but not limited to the advancement of health or the saving of lives, the advancement of animal welfare, the relief of those in need by reason of ill-health, disability, financial hardship or other disadvantage for the public benefit by the provision of advice, support and grants to individuals and registered, excepted and exempt charities with a particular focus on Europe and South-East Asia.

**Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)**

**Additional details of objectives and activities (Optional information)**

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

**Summary of the main achievements of the charity during the year**

The charity has raised over £16k this year. Around 40% of this income was distributed in line with our commitment last year to spend some of the reserve funds. Only 3% of the income was spent on administrative costs.

Funds have been distributed in accordance with the objectives of the charities particularly focusing on smaller institutions where a relatively small amount of money can have a big impact.

Our website [LotusPartnersFoundation.org](http://LotusPartnersFoundation.org) contains the institutions to whom money was given and some are listed below:

Gonville & Caius College, University of Cambridge

Plan International

Bhaktivedanta Manor Temple

Food For Life Vrindavan

## Section E

## Financial review

### Brief statement of the charity's policy on reserves

The reserves will continue to be distributed in the new financial year if income is insufficient to fund our commitments to charitable organisations, in accordance to the charities objectives.

### Details of any funds materially in deficit

### Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

## Section F

## Other optional information

## Section G

## Declaration

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

Signed on behalf of the charity's trustees

Signature(s)



Full name(s) Prof Pankaj Sharma

Position (eg Secretary, Chair, etc)

Chair

Date

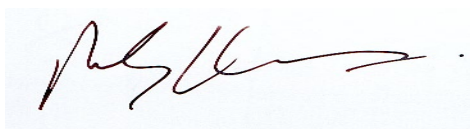
19.12.21

## LOTUS PARTNERS FOUNDATION

### STATEMENT OF FINANCIAL ACTIVITIES

#### YEAR ENDED 31 March 2021

|                                      | Unrestricted<br>£ | Restricted<br>£ | 2020 Total<br>£ | 2021 Total<br>£ |
|--------------------------------------|-------------------|-----------------|-----------------|-----------------|
| <b>Incoming Resources</b>            |                   |                 |                 |                 |
| Grants, Donations, Sales etc.        | 16025             | -               | 9276            | 16025           |
| Bank Interest                        | 0                 | -               | 0               | 0               |
| <b>Total Incoming Resources</b>      | <b>16025</b>      | <b>-</b>        | <b>9276</b>     | <b>16025</b>    |
| <br>                                 |                   |                 |                 |                 |
| <b>Direct Charitable Expenditure</b> |                   |                 |                 |                 |
| Core Work                            | 208               | -               | 132             | 208             |
| <br>                                 |                   |                 |                 |                 |
| <b>Other Expenditure</b>             |                   |                 |                 |                 |
| Fundraising, Publicity, Admin        | 311               | -               | 1077            | 311             |
| <b>Total Resources Expended</b>      | <b>6550</b>       | <b>-</b>        | <b>14570</b>    | <b>6550</b>     |
| <br>                                 |                   |                 |                 |                 |
| Net Incoming/(Outgoing)<br>Resources | 9475              | -               | (5294)          | 9475            |
| <br>                                 |                   |                 |                 |                 |
| <b>Funds as at 1 April 2020</b>      | <b>2958</b>       | <b>0</b>        | <b>2958</b>     | <b>2958</b>     |
| <br>                                 |                   |                 |                 |                 |
| <b>Funds as at 31 March 2021</b>     | <b>15411</b>      | <b>0</b>        | <b>2958</b>     | <b>15411</b>    |



Prof. Pankaj Sharma - Chairman

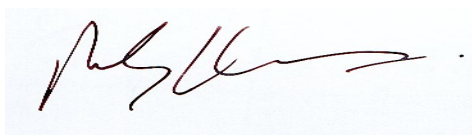
Signed on behalf of the Board of Trustees

18.12.21

## **LOTUS PARTNERS FOUNDATION**

### **BALANCE SHEET AS AT 31 MARCH 2020**

|  | <b><u>2020</u></b> | <b><u>2021</u></b> |
|--|--------------------|--------------------|
|  | £                  | £                  |
| <b>Fixed Assets</b>                                    | 0                  | 0                  |
| <b>Current Assets</b>                                  |                    |                    |
| Debtors  | 0                  | 0                  |
| Cash at Bank   | <u>2958</u>        | <u>15411</u>       |
|  | <b>2958</b>        | <b>15411</b>       |
| <b>Creditors – Amounts falling due within one year</b> | <u>0</u>           | <u>0</u>           |
| <b>Net Current Assets</b>                              | <b>2958</b>        | <b>15411</b>       |
| <b>Funds</b>   |                    |                    |
| Unrestricted Funds                                     | 2958               | 15411              |
| Restricted Funds                                       | <u>0</u>           | <u>0</u>           |
|  | <b>2958</b>        | <b>15411</b>       |



**Prof. Pankaj Sharma - Chairman**

**Signed on behalf of the Board of Trustees**

**18.12.21**

## **LOTUS PARTNERS FOUNDATION**

### **BALANCE SHEET AS AT 31 MARCH 2021**

#### **1. ACCOUNTING POLICIES**

##### **General**

The Financial Statements have been prepared under the Historical Cost Convention and in accordance with the applicable accounting standards and the charities SORP (Statement of Recommended Practice: 'Accounting by Charities').

#### **2. Summary of Net Assets by Funds.**

|                    | Unrestricted Funds | Restricted Funds | Total         |
|--------------------|--------------------|------------------|---------------|
| Net Current Assets | <u>£15411</u>      | <u>£0</u>        | <u>£15411</u> |

##### **Additional Notes:**

none