



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	04	2024		31	03	2025

Section A Reference and administration details

Charity name

Garratt Family Trust

Other names charity is known by

None

Registered charity number (if any)

1178292

Charity's principal address

Whitehouse Farm

St. Weonards

Hereford

Postcode

HR2 8QG

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	Peter Garratt	Chair		
2	Susan Garratt			
3	Timothy Garratt			
4	Polly Garratt			
5	Anthony Garratt			
6	Anna Garratt			
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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

Name	Dates acted if not for whole year

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Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Investment	Westleys Financial Planning	Eight Moorgate, 1 Dysart Street, London, EC2A 2BX

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

Lee Westley FPFS

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document
(eg. trust deed, constitution)

Constitution adopted 16/04/2018

How the charity is constituted
(eg. trust, association, company)

Charitable Incorporated Organisation (CIO)

Trustee selection methods
(eg. appointed by, elected by)

Suitably qualified family members, appointed by consensus.

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.

The trustees have closely followed the governance procedures set out in the Constitution.

Section C Objectives and activities

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

The objects of the CIO are to apply such funds as it may hold from time to time for such charitable purposes as are lawful for the benefit of individuals or associations, institutions or organisations established for such purposes.

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)

After research and appropriate due diligence, the Trustees resolved to increase further their grant support for the year 2024/25 to charities serving the needs of disadvantaged children and young adults. It was clear to the Trustees that the legacy of the covid pandemic was continuing to impact negatively on disadvantaged young people. A smaller community support donation was made to maternity training services. All these donations fall within our charitable objectives.

There were no further donations from the Garratt family to the Trust portfolio in the year under reference.

The Trustees declare that they have had regard to the guidance issued by the Charity Commission on public benefit in their management of the Trust over the period covered by this report.

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.

The charitable objectives of the CIO are as follows:

- To support the educational and career aspirations of creative young people
- To support environmental and conservation initiatives, especially those relating to the marine environment
- To support socially disadvantaged individuals and families
- To support the provision of midwifery and early child educational and developmental initiatives
- To support initiatives aimed at enabling the physically and /or mentally disadvantaged to achieve their full potential
- To make donations to registered UK charities

Our policy is not to accept unsolicited grant applications but to select beneficiaries based on the research and experience of the trustees. We aim to build long-term beneficial relationships, subject to positive reported outcomes. We will aim to distribute each year the accrued income from the trust's investment portfolio

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

The charity's investment income benefitted from improved market conditions in 2023/24, enabling total donations to be increased from £24000 to £27000 in line with income from the portfolio.

It was agreed that the annual donations in support of disadvantaged young people and adults should again be increased, reflecting the Trustees' continued confidence in the excellent work that these charities are doing under difficult conditions and the long-term effects of the covid pandemic lockdown on the disadvantaged young.

The smaller donation to midwifery services was made in response to a particular need identified by the Trustees.

Section E

Financial review

Brief statement of the charity's policy on reserves

The CIO aims to distribute income from the portfolio and draw upon capital only under exceptional circumstances.

Details of any funds materially in deficit

None

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.

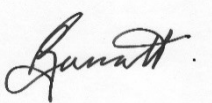
The sole source of capital funding is via donations from the Garratt Family.
These are invested in a diversified portfolio that generates income for distribution.

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)

	
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Full name(s)

Peter Garratt OBE	
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Position (eg Secretary, Chair, etc)

Chair

Date

19/12/2025



CHARITY COMMISSION
FOR ENGLAND AND WALES

Garratt Family Trust

1178292

Receipts and payments accounts

CC16a

For the period
from

4/1/2024

To

3/31/2025

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Transfers from investment portfolio	27,000	-	-	27,000	24,000
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	27,000	-	-	27,000	24,000
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	27,000	-	-	27,000	24,000
A3 Payments					
Disadvantaged Young People	26,000	-	-	26,000	20,000
Community Support	1,000	-	-	1,000	2,000
Wildlife Repopulation		-	-		1,000
Animal Welfare		-	-	-	1,000
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	27,000	-	-	27,000	24,000
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	27,000	-	-	27,000	24,000
Net of receipts/(payments)	-	-	-	-	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	5,000	-	-	5,000	5,000
Cash funds this year end	5,000	-	-	5,000	5,000

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

Categories	Details	Unrestricted funds	Restricted funds	Endowment funds
		to nearest £	to nearest £	to nearest £
B1 Cash funds	Cater Allen Bank Account	5,000	-	-
		-	-	-
		-	-	-
	Total cash funds	5,000	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

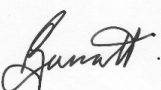
	Details	Unrestricted funds	Restricted funds	Endowment funds
		to nearest £	to nearest £	to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	CIO Investment portfolio (approx)		-	560,000
			-	-
			-	-
			-	-
			-	-

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

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	Peter Garratt	12/19/2025



CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
The Garratt Family Trust

On accounts for the year
ended

31st March 2025

Charity no
(if any)

1178292

Set out on pages

1

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended

Responsibilities and
basis of report

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

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

Independent
examiner's statement

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

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

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

Signed:

Date:

17/01/2026

Name:

John Bothamley CBE

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

Founder and chair of trustees of grant making foundation for 27 years

Address:

Treferanon, St.Weonards, Hereford HR2 8QF

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

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

None