



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	April	2022		31	March	2023

Section A

Reference and administration details

Charity name

MPA Charitable Foundation

Other names charity is known by

Registered charity number (if any) 1178740

Charity's principal address

MPA House

98 High Street

Henley in Arden

Postcode

B95 5BY

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	Philip John McGovern			
2				
3				
4				
5				
6				
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

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	CIO Foundation
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Appointed by the current Trustees

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 promote such charitable purposes as are set out in sections 2 & 3 of the charities act by the provision of grants as the trustees deem fit from time to time provided that such charitable purposes are in accordance with the laws of England and Wales and such charitable purposes are for the public benefit as defined in section 4 of the charities act.

Since we returned from lockdown, we have continued to promote our charity locally. We regularly update our website and send regular Eshots to our clients about our donations and to provide details of any local charities that may require our assistance.

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

We have assisted the following charities and individuals across the year – the stories are added to mpafm.co.uk regularly;

Ellie Pemberton

Ellie joined MPA as an intern in the summer, studying a finance degree at Liverpool University. With a keen interest in financial services and the progression of her career at the forefront of her mind, we discussed the routes into Financial Services and specifically the CII examination process.

As Ellie showed great promise and with her currently being off university for the summer, we agreed to sponsor Ellie for the summer to allow her to gain experience within the industry and furthermore allow her to commence her CII exams, with a view of obtaining a Diploma in Financial Services.

With the strapline of MPA Financial Management being “Inform, Educate, Inspire” we thought that this was a great opportunity for the charity to assist a young lady, with great promise, whom may not have been given this opportunity. As a result of our sponsor, Ellie obtained her Diploma.

Jared Jones

Jared was initially a client of MPA Financial Management who showed a keen interest in the industry. Due to COVID, he was made redundant from his previous job in Medi-sales, and as a result of COVID was unlikely to obtain a job in the industry so was looking for a career change.

Jared started to regularly meet with Phil, in his own time, to discuss the industry and was invited on our regular ZOOM training days to increase his knowledge in the industry.

With his interest growing, we agreed to sponsor Jared for a maximum of 12 months to obtain his Diploma in Financial Services – he dedicated 12 months of his time to MPA and the exams, which were funded by the MPA Charitable Foundation. With Ellie in a similar position, it was something they would focus on together and to date. As a result of our sponsor, Jared obtained her Diploma.

Camps International

Towards the end of 2022, we were contacted by Oliver Kerslake and Toby Beaumont, two students from Bosworth College, who were planning on travelling to Costa Rica to take part in a range of humanitarian projects.

Oliver and Toby were looking for sponsorship in order to make their trip a reality, and MPA, along with a range of other local businesses, were happy to sign up to support the pair who raised over £2,000 to make their trip possible. As you will see from the video below, as part of the sponsorship, all companies received their logo on t-shirts that Oliver and Toby will wear throughout their mission.

Fast forward 8 months and Oliver and Toby have now arrived in Costa Rica to begin their month long expedition.

They will be working in 2 camps. The first is Camp Osa which sits among the trees. Here, project work will be focussed on the conservation of the forest in the hills above the camp itself. They will also spend a couple of days working with a local NGO focusing on protecting the nesting ground of turtles on the nearby beach.

The second, Camp Terraba, is located within a local community made up of indigenous people. Projects here will focus on both the needs of the community and the local environment. These include building classrooms to improve access to education, installing a clean water supply, constructing marketplaces for communities to generate income and building new homes for vulnerable families.

A typical day will consist of:

07:00 Breakfast

08:00 Trek to project

09:00-12:00 project work

12:00-14:00 well deserved rest

14:00-17:00 project work

18:00 Dinner

21:00 Bedtime

The pair will be sharing updates on their trip on social media ([Facebook](#) and [Instagram](#)) and we will also keep you informed about how they get on.

Good luck Oliver and Toby!

The Hub – Christmas Lunch

We are very proud to have once again made a donation to the annual Henley-in-Arden Community Christmas Day Lunch 2022 via the MPA Charitable Foundation.

Taking place at the HUB @ Henley Community Centre on Christmas Day, The Henley Christmas Lunch is a free event that provides all vulnerable and lonely residents in our areas with a place to go on Christmas Day. It ensures that no one in Henley in Arden eats Christmas lunch alone.

Since it began in 2018, organised by several local church groups, the lunch has become essential to many people within our local community. During the Covid Christmas lockdown, meals were delivered to people in their own homes and this has now become a regular feature of the day.

People attending the lunch enjoy a sit-down meal, entertainment and free transport to and from the event.

It was originally started primarily for elderly people within Henley, but now, due to the rising cost of living, the organisers are seeing increased demand from younger people and families, especially for the home deliveries. Organisers are expecting approximately between 60-80

people to attend this year which is double the number of people that attended in 2018.

Peter Crathorne, Chair of the Hub @ Henley Community Centre comments: "In addition to more people attending, due to rising inflation the cost of organising the lunch has also increased this year. Therefore, it is more important than ever that we are able to enjoy the support of MPA's Charitable Trust and other local companies that donate to the event."

SING – Bentley Heath & Midlands Jazz Orchestra

Getting together to enjoy Christmas carols and concerts is a cornerstone of many people's Christmas. Given that music events were missed by many over recent years, we are proud to have supported two local music groups this Christmas with £700 through the MPA Charitable Foundation.

The Sing! Choir in Bentley Heath is a community choir that is open to everyone. The choir perform a variety of songs and styles from pop to swing. Our Receptionist Liz Allen is a proud member of the group, and we were pleased to be able to make a £500 donation to support the ongoing running of the group in 2023.

The choir has a tremendous community spirit and does so much to fundraise and help others within the local community. Our donation will go towards funding licencing costs, promotion of the Spring Sing Concert and keeping tickets at affordable rates so the choir can be enjoyed by as many people as possible. It will also allow the choir to perform in smaller venues like care homes and dementia cafes. We hope it will help the choir enjoy a successful 2023.

In addition, we have donated £200 to the Midland Youth Jazz Orchestra. Celebrating its 50 anniversary this year, it is one of the world's top youth jazz groups and it is returning to Henley in Arden this Christmas to perform a variety of Big Band music as part of its 'Fanfare to Christmas' concert.

The long-established orchestra supports young people in developing their musical talents and is currently under the direction of award-winning trumpeter and conductor John Ruddick MBE.

Our donation has been used to purchase 20 tickets for the concert which have been given to our staff to distribute to local youth clubs and Scout groups to enable them to watch the concert for free and hopefully spark their interest in big band music.

Section E Financial review

Brief statement of the charity's policy on reserves

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.

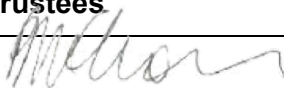
Section F Other optional information

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)

Philip McGovern

Position (eg Secretary, Chair, etc)

Trustee

Date

18.12.2023



CHARITY COMMISSION
FOR ENGLAND AND WALES

MPA Charitable Foundation

1178740

Receipts and payments accounts

CC16a

For the period
from

3/1/2022

To

3/31/2023

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					
Donations	11,810	-	-	11,810	24,998
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	11,810	-	-	11,810	24,998
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	11,810	-	-	11,810	24,998
A3 Payments					
Donations Paid	11,839	-	-	11,839	24,878
professional Fees	-	-	-	-	300
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	11,839	-	-	11,839	25,178
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	11,839	-	-	11,839	25,178
Net of receipts/(payments)	- 29	-	-	- 29	- 180
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	10,045	-	-	10,045	10,225
Cash funds this year end	10,016	-	-	10,016	10,045

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 £
B1 Cash funds	Bank Account - 40952968	10,016	-	-
		-	-	-
		-	-	-
	Total cash funds	10,016	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	to nearest £	to nearest £	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 of approval	
	P McGovern	P McGovern	18.12.2023	