

AFPA TRUST

England & Wales · Charity number 1179114

Details

Other names ASSET FINANCE PROFESSIONALS ASSOCIATION

Status Registered

Legal form Other

Registered 2018-07-09

Register [View on the Charity Commission register](#)

Contact

Address The Homestead
Upper Church Street
Cuddington
Aylesbury
Buckinghamshire
HP18 0AP

Phone 07767436892

Email robmojo65@hotmail.com

Website www.afpatrust.com

Activities

Objects: THE CHARITY'S OBJECTS ('THE OBJECTS') ARE:1.TO PROMOTE SOCIAL INCLUSION FOR THE PUBLIC BENEFIT BY PREVENTING PEOPLE SOCIALLY EXCLUDED, RELIEVING THE NEEDS OF THOSE PEOPLE WHO ARE AND ASSISTING THEM TO INTEGRATE INTO SOCIETY. FOR THE PURPOSE OF THIS CLAUSE'SOCIALLY EXCLUDED' MEANS BEING EXCLUDED FROM SOCIETY, OR PARTS OF SOCIETY, AS A RESULT OF ONE OF MORE OF THE FOLLOWING FACTORS: UNEMPLOYMENT; FINANCIAL HARDSHIP; YOUTH OR; ILL HEALTH (PHYSICAL OR MENTAL); SUBSTANCE ABUSE OR DEPENDENCY INCLUDING DRUGS; DISCRIMINATION ON THE GROUNDS OF SEX, RACE, DISABILITY, ETHNIC ORIGIN, RELIGION,BELIEF, CREED, SEXUAL ORIENTATION OR GENDER RE-ASSIGNMENT; POOR EDUCATIONAL OR; RELATIONSHIP AND FAMILY BREAKDOWN; POOR HOUSING (THAT IS HOUSING THAT MEET BASIC HABITABLE STANDARDS; CRIME (EITHER AS A VICTIM OF CRIME OR AS AN INTO SOCIETY).2.THE RELIEF OF SICKNESS AND THE PRESERVATION OF HEALTH AMONG PEOPLE OR TEMPORARILY IN THE UNITED KINGDOM.3.THE PREVENTION OR RELIEF OF POVERTY ANYWHERE IN THE WORLD BY PROVIDING OR THE PROVISION OF EDUCATION, TRAINING, HEALTHCARE PROJECTS AND ALL THE DESIGNED TO ENABLE INDIVIDUALS TO GENERATE A SUSTAINABLE INCOME AND BE SELF-SUFFICIENT.4.THE RELIEF OF FINANCIAL NEED AND SUFFERING AMONG VICTIMS OF NATURAL OR OTHER DISASTER IN THE FORM OF MONEY (OR OTHER MEANS DEEMED SUITABLE) FOR PERSONS, BODIES, ORGANISATIONS AND/OR COUNTRIES AFFECTED.5.FOR THE PUBLIC BENEFIT TO PROMOTE THE EDUCATION OF PEOPLE IN THE ASSET FINANCE,CONSUMER FINANCE AND BANKING INDUSTRY ("THE FINANCE INDUSTRY") IN SUCH WAYS CHARITY TRUSTEES THINK FIT, INCLUDING BY:(I)AWARDING TO SUCH PERSONS SCHOLARSHIPS, MAINTENANCE ALLOWANCES TENABLE AT ANY UNIVERSITY, COLLEGE OR INSTITUTION OF HIGHER OR.(II)PROVIDING THEIR EDUCATION, TO UNDERTAKE TRAVEL IN FURTHERANCE OF OR TO PREPARE FOR ENTRY TO, OR PROGRESS IN, THE FINANCE INDUSTRY OR PROFESSIONS ALLIED TO THE FINANCE INDUSTRY ON LEAVING ESTABLISHMENT OR APPROVED APPRENTICESHIP PROGRAMME.

Activities: Through industry networking events we raise funds which we donate to chosen charities.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Sponsors Or Undertakes Research
- **What:** General Charitable Purposes, Education/training, Disability, The Prevention Or Relief Of Poverty, Other Charitable Purposes
- **Who:** Children/young People, Elderly/old People, People With Disabilities, Other Charities Or Voluntary Bodies, The General Public/mankind

Geography

- Throughout England

Finances

Period end	Income	Expenditure	Assets	Employees
2024-09-30	£78,770	£67,285	-	-
2023-09-30	£53,099	£60,583	-	-
2022-09-30	£10,739	£15,061	-	-
2021-09-30	£14,051	£10,044	-	-
2020-09-30	£12,525	£12,526	-	-

Trustees

Name	Role	Appointed
Adrian Edward Langford		2020-08-24
Aysha Ellis-Aziz		2020-09-08
DAVID MARSH		2018-01-10
Grant Edward Vinten		2024-09-05
JOHNNIE HALLIDAY		2018-01-10
Jane Emily Bird		2024-09-05
Julie Dawn Warren		2025-03-28
Keith Nowland		2023-12-02
Mark Thomas Sanderson		2020-08-24
Matthew David Chambers		2024-09-05
ROBERT MORRIS-JONES		2018-01-10
Robert Oliver Taylor		2020-08-25
STEVE DEXTER		2018-01-10
VINCE O'HANLON		2018-01-10

AFPA TRUST

England & Wales - Charity number 1179114

Accounts



**Annual Report and Accounts for AFPA Trust
Limited (Charity No 1179114 and Company
No.08480755)**

Year ended 30th September 2024

Introduction

This is AFPA (“Asset Finance Professionals Association”) Trust Ltd’s 2024 annual report covering the accounts for the year ended on 30th September 2024 and also comparatives for the years ended 30th September 2023 and 2022.

Report from the Chairman

In our Mission Statement we state that we want to become the “Go to” organization for charity in our Industry and to promote networking and good causes together. Furthermore we want to increase the value of what we can raise in the way of charitable funds and do more good for those who need it. Since the end of the COVID pandemic we have been able to increase the frequency and nature of the events we have organized and therefore significantly increase our charitable donations. Total income has increased from £10,739 in the year to 30th September 2022 to £53,099 in 2022/23 and £78,770 in 2023/24.

The main events that took place in the year to 30th September 2024 were as follows:

- In December there was the Annual Christmas Drinks at Home House, Portman Square in London. The total amount raised at this event was £12,845. The total paid over to Alexander Devine Children’s Hospice was £13,000 which included what Alexander Devine raised themselves at the event.
- In May 2024 the 2nd annual “Big Quiz” night took place. We raised in total £21,756 and after paying our host for the night “The Royal Overseas League” we were able to donate £15,750 to 5 different charities ie. £5,500 to “Stepping Stones DS”, £5,500 to “Make A Wish Foundation”, £3,250 to the “British Heart Foundation,” £1,000 to “Change Please Foundation” and £500 to the “Marine Conservation Society”.
- The Annual Summer Drinks were also held at Home House, Portman Square on 3rd July 2024. The total amount raised at this event was £10,802 which meant that a donation of £10,000 could be made to Guys and St Thomas Foundation which includes what the latter raised themselves at the event.
- The 1st AFPA Trust “Big” Golf Day took place on 23rd July at the Berkshire Golf Club. £3,240 was donated to four Charities including £1,620 to “SPLIT” and £1,000 to the “MCA Trust”.

The Charity Partner Program was launched for the first time in April 2024. A Gold Charity Partner made an annual donation of £2,000, a Silver Partner £1,000 and a Bronze Partner £500. Partners get priority booking and pricing discounts at AFPA’s events. In total £21,000 was raised by this Program. Many thanks to Alica Bank, Investec, Lti Technology Solutions, Metro Bank, Netsol, Odessa, Paragon and Propel Finance who became Gold Partners; Haydock Finance, VIP Apps and Compass Business Finance who were Silver Partners and our Bronze Partners Finativ, LeasePath and Novuna.

As a principle it is AFPA Trust’s strategy to break even financially each year and keep its costs to a minimum. None of the Trustees receive any remuneration for the work they perform for AFPA. The only significant expenses are for Website hosting which for the year to 30th September 2024 was £1,278 and a charge of £1,300 for the new website design.

For the year to 30th September 2024 AFPA made an Operating surplus of £11,485. The main reason for this significant surplus was that the Trustees made a decision to build up a cushion in our bank account so that we have enough funds to pay for upfront deposits to the hosts of our events plus for any unforeseen events.

Finally I would like to thank all the Trustees of AFPA Trust for their hard work and support throughout the year.

Robert Taylor

Chair

29th April 2025.

AFPA Trustees

The ongoing Management and administration of AFPA Trust Ltd is carried out by the Trustees who also act as a Management Committee that meets on a monthly basis. The Trustees keep formal minutes of its meetings. The Trustees are appointed according to the rules set out in AFPA Trust's Constitution. As at the end of March 2025 the Trustees are as follows:

Name	Role	Served
Robert Taylor	Chair & Director	Full Year
Aysha Ellis-Aziz	Deputy Chair & Director	Full year
Rob Morris-Jones	Treasurer, Finance Director and Company Secretary	Full Year
Adrian Langford	Trustee and former Chair	Full Year
Steve Dexter	Trustee	Full year
Vince O'Hanlon	Trustee	Full year
Mark Sanderson	Trustee	Full Year
Johnnie Halliday	Trustee and former Chair	Full year
David Marsh	Trustee	Full year
Matt Chambers	Trustee	Appointed 5 th September 2024
Jane Bird	Trustee	Appointed 5 th September 2024
Grant Vinten	Trustee	Appointed 5 th September 2024
Julie Warren	Trustee	Appointed 28 th March 2025
Keith Nowland	Trustee	Appointed 2 nd December 2023

The Directors

As at the end of March 2025 the Directors of AFPA Trust Ltd are as follows:

Name	Role	Served
Robert Eggleston	Director and Secretary	Resigned 9 th October 2023
Rob Morris-Jones	Finance Director and Secretary	Full Year
Robert Taylor	Chairman	Appointed 9 th October 2023
Aysha Ellis-Aziz	Deputy Chairman	Appointed 9 th October 2023

AFPA TRUST LTD
INCOME AND EXPENDITURE ACCOUNT

	12 months ending 30-Sep-24	12 months ending 30-Sep-23	12 months ending 30-Sep-22
Income	£	£	£
Cirque du Solei donations (Wings for Life)		2,000	-
Gala Dinner sponsorship / tickets / raffle		12,000	-
Big Quiz sponsorship / tickets / raffle		28,660	-
Summer Drinks sponsorship		2,600	-
Other membership fees and event tickets	1,298	7,839	4,754
Summer Drinks sponsorship / raffle		-	5,985
Christmas Drinks sponsorship	4,500		
Christmas Drinks event tickets & membership fees	8,345		
IWD Lunch - 8th March 2024	1,650		
Charity Partner Program	18,974		
2024 Big Quiz sponsors / tickets	21,756		
2024 Big Golf - 23rd July 2024	7,615		
Summer Drinks sponsorship	3,500		
Summer Drinks event tickets & membership fees	7,302		
LTI Lunch - May 2024	650		
2024 Big Clays - 23rd October 2024	3,180		
Total income	78,770	53,099	10,739
Expenditure			
Donation - Wings for Life		2,900	-
Donation - DePaul		10,000	-
Donation - Newlife		500	-
Donation - Launchpad Reading		3,000	-
Donation - Blackburn Youth Zone		500	-
Donation - Naomi House		500	-
Gala Dinner - SSAFA - Armed Forces Charity Donation		5,000	
Summer Drinks - Alexander Devine Donation		6,750	
Christmas Drinks - Alexander Devine Donation	3,452		
Event payments - Royal Overseas League	12,344	20,873	-
Event payment - Home House		3,000	-
Event payment - Home House - Christmas Drinks	864	5,000	
Website hosting costs	1,278	1,560	1,461
Annual data protection registration	40		
Event payment - IWD Lunch - Jane Bird	1,125		
Home House - Summer Drinks	4,381		
Deposit - Trigger Group - The Big Clays	6,750		
Deposit - Christmas Drinks - Langans	2,000		
Other expenses		1,000	-
Charitable Donation to Marine Conservation Society	500		
Charitable donation - Stepping Stones DS - Big Quiz Paragon	5,500		
Paul Mayne - MC of Big Quiz	1,000		
Charitable donation - Make A Wish Foundation	5,500		
Charitable donation - British Heart Foundation	3,250		
Charitable donation - Change Please Foundation	1,000		
MC Herciu - event photographer - Summer Drinks	350		
The Berkshire Golf Club - Big Golf	7,290		
Kudobear Ltd - new website design	1,300		
Charitable donation - Guys and St Thomas Foundation - Summer Drinks	6,120		
Charitable donation - The Foundation Centre - Big Golf	370		
Charitable donation - St Giles Hospice - Big Golf	250		
Charitable donation - MCA Trust - Big Golf	1,000		
Charitable donation - SPLIT - Big Golf	1,620		
Donation - Medical Detection Dogs		-	7,100
Donation - Mid Sussex Riding for the Disabled		-	6,500
Total expenditure	67,285	60,583	15,061
Operating surplus / (deficit) for the period	11,485	-7,484	-4,322

AFPA TRUST LTD
BALANCE SHEET AS AT 30 SEPTEMBER 2024

	30-Sep-24	30-Sep-23	30-Sep-22
	£	£	£
Bank account - Weatherbys	11,746	261	7,745
NET ASSETS	<u>11,746</u>	<u>261</u>	<u>7,745</u>
Share Capital	-	-	-
Accumulated fund at beginning of year	261	7,745	12,067
(Deficit) / surplus for the year	11,485 -	7,484 -	4,322
TOTAL FUNDS	<u>11,746</u>	<u>261</u>	<u>7,745</u>

I certify that these accounts have been prepared from the books and records provided and all deposits and payments are reconciled to the bank statements

Signed :

Independent Examiner

Date : xx/xx/2025



**Annual Report and Accounts for AFPA Trust
Limited (Charity No 1179114 and Company
No.08480755)**

Year ended 30th September 2024

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AFPA TRUST LTD
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Donation - Newlife		500	-
Donation - Launchpad Reading		3,000	-
Donation - Blackburn Youth Zone		500	-
Donation - Naomi House		500	-
Gala Dinner - SSAFA - Armed Forces Charity Donation		5,000	
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Accumulated fund at beginning of year	261	7,745	12,067
(Deficit) / surplus for the year	11,485 -	7,484 -	4,322
TOTAL FUNDS	<u>11,746</u>	<u>261</u>	<u>7,745</u>

I certify that these accounts have been prepared from the books and records provided and all deposits and payments are reconciled to the bank statements

Signed :

Independent Examiner

Date : xx/xx/2025

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Surplus / (Deficit) for the year	11,485	7,484	4,322
TOTAL FUNDS	11,746	261	7,745

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Signed :

Carinnicott

Caroline Winnicott
Independent Examiner

Date :

14/06/2025

AFPA TRUST

England & Wales - Charity number 1179114

Accounts



**Annual Report and Accounts for AFPA Trust
Limited (Charity No 1179114 and Company
No.08480755)**

Year ended 30th September 2023

Introduction

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Report from the Chairman

In our Mission Statement we state that we want to become the “Go to” organization for charity in our Industry and to promote networking and good causes together. Furthermore we want to increase the value of what we can raise in the way of charitable funds and do more good for those who need it. Unfortunately due to the restrictions imposed as a result the COVID pandemic the value we could raise for charities significantly declined during 2021 and 2022. However since the beginning of 2023 we have been able to increase the frequency and nature of the events we have organized and therefore significantly increase our charitable donations.

In May we had the “Big Quiz” night which was repeated in May 2024. We raised in total £28,660 and after paying our host for the night “The Royal Overseas League” we were able to donate £14,500 to 5 different charities including £10,000 to “DePaul” and £3,000 to “Launch Pad Reading”.

On 8th July there was the “Gala Dinner” - also at the Royal Overseas League - at which we raised £12,000 which resulted in AFPA being able to donate £5,000 to SSAFA “the Armed Forces Charity, The Solders’, Sailors’, and Airmen’s Families Association” in August.

On 17th August 2023 there was the Annual Summer Drinks at Home House, Portman Square. The total amount raised at this event was £11,865 which meant that a donation of £10,000 could be made to Alexander Devine Children’s Hospice.

As a principle it is AFPA Trust’s strategy to break even financially each year and keep its costs to a minimum. None of the Trustees receive any remuneration for the work they perform for AFPA. The only significant expense is for Website hosting which for the year to 30th September was £1,560. For the year to 30th September 2023 AFPA made an Operating deficit of £7,484. However if the deposit paid to Home House of £5,000 in August for the Christmas Drinks event is excluded the deficit would have been only £2,484. As at 30th September 2023 Net Assets were £262 compared to £7,746 as at 30th September 2022.

AFPA Trust could not exist without the great support from our event sponsors. In particular I would like to thank VitrX, LTi Technology, Clear Business Finance, NetSol, Global Lifecycle Solutions, Catfoss Finance, Acquis, Close Brothers, Paragon, Cordoba Rewards, Asset Finance Connect and Rivermore Asset Finance who have supported us over many years. I would also like to thank all the work and support that is contributed by the Trustees. In particular I would like to thank my predecessor Adrian Langford who stepped down as Chairman in August 2023.

Robert Taylor

Chairman

4th July 2024

AFPA Trustees

The ongoing Management and administration of AFPA Trust Ltd is carried out by the Trustees who also act as a Management Committee that meets on a monthly basis. The Trustees keep formal minutes of its meetings. The Trustees are appointed according to the rules set out in AFPA Trust's Constitution. As at the end of June 2024 the Trustees are as follows:

Name	Role	Served
Adrian Langford	Trustee	Full Year
Robert Taylor	Chairman	Full Year
Rob Morris-Jones	Treasurer and Finance Director	Full Year
Aysha Ellis-Aziz	Deputy Chairman & Director	Full year
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Vince O'Hanlon	Trustee	Full year
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AFPA TRUST LTD
INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 30 SEPTEMBER 2023

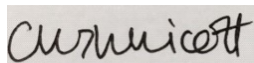
	Year ended 30-Sep-23	Year ended 30-Sep-22	Year ended 30-Sep-21
	£	£	£
Income			
Cirque du Solei donations (Wings for Life)	2,000	-	-
Gala Dinner sponsorship / tickets / raffle	12,000	-	-
Big Quiz sponsorship / tickets / raffle	28,660	-	-
Summer Drinks sponsorship	2,600	-	3,750
Other membership fees and event tickets	7,839	4,754	7,764
Summer Drinks sponsorship / raffle	-	5,985	-
Virtual Cycling Tour of Britain sponsorship	-	-	1,750
Bristol Event sponsorship	-	-	786
Total income	53,099	10,739	14,050
Expenditure			
Donation - Wings for Life	2,900	-	-
Donation - DePaul	10,000	-	-
Donation - Newlife	500	-	-
Donation - Launchpad Reading	3,000	-	-
Donation - Blackburn Youth Zone	500	-	-
Donation - Naomi House	500	-	-
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Event payments - Royal Overseas League	20,873	-	-
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Event payment - Home House - Christmas Drinks	5,000	-	-
Website hosting costs	1,560	1,461	1,370
Other expenses	1,000	-	201
Donation - Medical Detection Dogs	-	7,100	-
Donation - Mid Sussex Riding for the Disabled	-	6,500	-
Donation - Children Street Charity	-	-	3,250
Donation - Christie Charity	-	-	3,000
Event payment - Yacht Event	-	-	1,440
Event payment - Tobacco Factory Enterprises	-	-	783
Total expenditure	60,583	15,061	10,044
Operating (deficit) / surplus for the year	<u>-7,484</u>	<u>-4,322</u>	<u>4,006</u>

AFPA TRUST LTD
BALANCE SHEET AS AT 30 SEPTEMBER 2023

	30-Sep-23	30-Sep-22	30-Sep-21
	£	£	£
Bank account - Weatherbys	262	7,746	12,068
NET ASSETS	<u>262</u>	<u>7,746</u>	<u>12,068</u>
Share Capital	-	-	-
Accumulated fund at beginning of year	7,746	12,068	8,062
(Deficit) / surplus for the year	- 7,484 -	4,322	4,006
TOTAL FUNDS	<u>262</u>	<u>7,746</u>	<u>12,068</u>

I certify that these accounts have been prepared from the books and records provided and all deposits and payments are reconciled to the bank statements

Signed :



Caroline Winnicott
Independent Examiner

Date :

04-Jul-24