

PATRICK FAMILY TRUST

England & Wales · Charity number 1180057

Details

Status Registered

Legal form CIO

Registered 2018-09-24

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

Contact

Address 16 Devonshire Avenue
Beeston
Nottingham
NG9 1BS

Phone 01159250385

Activities

Objects: TO ADVANCE SUCH CHARITABLE PURPOSES FOR THE PUBLIC BENEFIT, PRIMARILY BUT NOT EXCLUSIVELY IN THE UK AND IN MALAWI AND ETHIOPIA, AS ARE EXCLUSIVELY CHARITABLE ACCORDING TO THE LAWS OF ENGLAND AND WALES AS THE TRUSTEES MAY FROM TIME TO TIME DETERMINE.

Activities: We operate from the UK with family trustees based in England, Scotland and Wales. We work proactively, initiating projects working with civil sector organisations in Malawi and Ethiopia, and giving donations/grants primarily to charities in the UK and in Africa. We focus on maximising the effectiveness of our funding and on finding innovative ways of supporting beneficiaries.

Classification

- **How:** Makes Grants To Organisations, Provides Other Finance, Sponsors Or Undertakes Research
- **What:** Education/training, Disability, Economic/community Development/employment, Human Rights/religious Or Racial Harmony/equality Or Diversity, Other Charitable Purposes
- **Who:** People With Disabilities, Other Charities Or Voluntary Bodies

Geography

- Ethiopia
- Malawi
- Scotland
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£30	£3,043	-	-
2024-03-31	£5,062	£10,000	-	-
2023-03-31	£15,041	£6,900	-	-
2022-03-31	£1	£13,300	-	-
2021-03-31	£11	£17,056	-	-

Trustees

Name	Role	Appointed
Dr John PATRICK	Chair	2018-09-24
DANIEL JOHN PATRICK		2018-09-24
DAVID THOMAS PATRICK		2018-09-24
JANET CHRISTINE PATRICK		2018-09-24
JONATHAN MARK PATRICK		2018-09-24
JOSEPH JAMES PATRICK		2018-09-24

PATRICK FAMILY TRUST

England & Wales - Charity number 1180057

Accounts

Patrick Family Trust

Report for April 2024 - March 2025; seventh year of operation

Governance and Administration:

The Patrick Family Trust (Charity Registration No. 1180057) is a Charitable Incorporated Organisation whose principal address is 16 Devonshire Avenue, Beeston, Nottingham NG9 1BS, and which is regulated by a constitution dated 24th September 2018.

The charity's aims are "to advance such charitable purposes for the public benefit, primarily but not exclusively in the UK and in Malawi and Ethiopia, as are exclusively charitable according to the laws of England and Wales as the trustees may from time to time determine, in particular, but not limited to

[a] education and training,

[b] overseas aid and disaster relief,

[c] community development, and

[d] support of marginalised people including prisoners, disabled and migrants."

The trustees throughout the year have been:

Dr John M Patrick [Founder; Chair]

Mr Jonathan Patrick

Mrs Janet Patrick [Founder]

Mr Daniel Patrick

Mr David Patrick

Mr Joseph Patrick

The trust is managed by the founders in consultation with the other trustees. The trustees held their AGM in person in Breconshire in April 2025 with all members present.

Assets & Liabilities and Reserves Policies:

The Trust holds its cash assets in a NatWest current account and a NatWest interest-earning Reserve Account.

It also holds reserve funds invested with Epworth Investment Management Ltd, owned by the Methodist Church.

The Trust makes grants and donations solely out of banked funds and does not commit beyond that limit. We incur minimal administrative costs and pay no salaries.

Activities during 2024-25:


The trustees continue to have regard to the guidance issued by the Charity Commission on public benefit.

The only **income received** was £30 interest on NatWest bank deposits.

The **Epworth Investment account** had been set up last year to provide a vehicle ready to hold the bulk of the future endowed funds for growth, income and social impact. The 80% of our holding invested in the **Epworth Climate Stewardship Fund** grew in value by 5.7% during this financial year. The remaining 20% was held in cash on interest.

The Trust made **grants/donations** totalling £3,043 during the year. 18% went to a UK organisation [**Parkrun**] and the rest overseas: \$600 to **Bridges to Malawi** for famine relief there, £500 each to **Christian Aid** and the **Disasters Emergency Committee** [DEC] for their work in Gaza, and £1000 to **Engera**, a private charity running a health centre in southern Ethiopia.

A summary of the **Receipts & Payments account** for the year 1/4/2024 to 31/3/2025 is attached.

 CHARITY COMMISSION FOR ENGLAND AND WALES	Patrick Family Trust		1180057	CC16a
	Receipts and payments accounts			
	For the period from	01-Apr-24	To	

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year 2023-24
A1 Receipts					
Donations received	£ -	£ -	£ -	£ -	£ 5,000
Bank interest	£ 30	£ -	£ -	£ 30	£ 62
Sub total (Gross income for AR)	£ 30	£ -	£ -	£ 30	£ 5,062
					£ -
A2 Asset and investment sales	£ -				£ -
Sub total	£ -	£ -	£ -	£ -	£ -
					£ -
Total receipts	£ 30	£ -	£ -	£ 30	£ 5,062
					£ -
A3 Payments					£ -
Donations - UK	£ 550	£ -	£ -	£ 550	£ -
Donations - Overseas	£ 2,493	£ -	£ -	£ 2,493	£ -
Total payments	£ 3,043	£ -	£ -	£ 3,043	£ 10,000
					£ -
Net of receipts/(payments)	-£ 3,013	£ -	£ -	-£ 3,013	-£ 4,938
A5 Transfers between funds	£ -	£ -	£ -	£ -	£ -
A6 Cash funds last year end	£ 3,619	£ -	£ -	£ 3,619	£ 8,557
Cash funds this year end	£ 606	£ -	£ -	£ 606	£ 3,619

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

Categories	Details	Unrestricted funds	Restricted funds	Endowment funds
B1 Cash funds	NatWest Current account	110		
	NatWest Reserve account	586		
	Total cash funds	696		
B3 Investment assets	Epworth Investment Managers	£ 11,354		
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
		Dr J M Patrick		
		Mrs Janet Patrick		

PATRICK FAMILY TRUST

England & Wales - Charity number 1180057

Accounts

Patrick Family Trust

Report for April 2023 - March 2024; sixth year of operation

Governance and Administration:

The Patrick Family Trust (Charity Registration No. 1180057) is a Charitable Incorporated Organisation whose principal address is 16 Devonshire Avenue, Beeston, Nottingham NG9 1BS, and which is regulated by a constitution dated 24th September 2018.

The charity's aims are "to advance such charitable purposes for the public benefit, primarily but not exclusively in the UK and in Malawi and Ethiopia, as are exclusively charitable according to the laws of England and Wales as the trustees may from time to time determine, in particular, but not limited to

[a] education and training,

[b] overseas aid and disaster relief,

[c] community development, and

[d] support of marginalised people including prisoners, disabled and migrants."

The trustees throughout the year have been:

Dr John M Patrick [Founder; Chair]

Mrs Janet Patrick [Founder]

Mr David Patrick

Mr Jonathan Patrick

Mr Daniel Patrick

Mr Joseph Patrick

The trust is managed by the founders in consultation with the other trustees. The trustees held their AGM in person in Beeston in January 2024 with all members present.

Assets & Liabilities and Reserves Policies:

The Trust holds its cash assets in a NatWest current account and a NatWest interest-earning Reserve Account.

It now also holds reserve funds invested with Epworth Investment Management Ltd, owned by the Methodist Church.

The Trust makes grants and donations solely out of banked funds and does not commit beyond that limit. We incur minimal administrative costs and pay no salaries.

Activities during 2023-24:

The trustees continue to have regard to the guidance issued by the Charity Commission on public benefit.

The Trust **received** £5,000 as a fourth seed-funding **donation** from its founders.

The Trust made no **grants/donations** during the year. The managing trustees have set up an **investment account** to further the Trust's policy of investing some of the future endowed funds for growth, income and social impact.

A summary of the **Receipts & Payments account** for the year 1/4/2023 to 31/3/2024 for submission to the Charity Commission is attached.

Signed on behalf of all the trustees: John M Patrick, Chair **Dated:** 10 May 2024

Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year	
-	-	-	-	-	£ 55,220
1	-	-	1	11	£ 135
1	-	-	1	11	£ 55,620
1	-	-	1	11	£ -
13,300	-	-	13,300	17,056	£ 50,142
-	-	-	-	-	£ -
13,300	-	-	13,300	17,056	£ 60,142
13,299	-	-	13,299	17,045	£ -
13,715	-	-	13,715	30,760	£ 416
416	-	-	416	13,715	£ 8,557

A1 Receipts	
Donations received	£ 55,220
Bank interest	£ 135
Sub total (Gross income for AR)	£ 55,620
Total receipts	£ -
A3 Payments	
Sub total	£ 50,142
A4 Asset and investment purchases	
nil	£ -
Sub total	£ 10,000
Total payments	£ -
Net of receipts/(payments)	#REF!
A6 Cash funds last year end	
Cash funds this year end	£ 416
	£ 8,557

and liabilities at the end of the period

Details	Unrestricted funds	Restricted funds	Endowment funds
	to nearest £	to nearest £	to nearest £
NatWest Current account	28	-	-
NatWest Reserve account	388	-	-
Total cash funds	416	-	-
Nil			

Signature	Print Name	Date of approval
	Dr J M Patrick	
	Mrs Janet Patrick	

where any potential liability under the guarantee is outstanding at the date of the IO and which is secured by an express charge on any of the assets of the CIO.

of the statement of assets and liabilities which is owed by the CIO and which is re assets of the CIO.

Section B Statement of assets

Categories
B1 Cash funds
B3 Investment assets
Signed by one or two trustees on behalf of all the trustees

PATRICK FAMILY TRUST

England & Wales - Charity number 1180057

Accounts

The Trust made one-off **grants/donations** totalling £6,900, 75% via the Big Give Christmas Appeal which attracting matching funding. All except £1,100 went to UK charities operating overseas.

The managing trustees will continue with their primary task of **setting up the business infrastructure** for future operations when the Trust is fully endowed and the management has passed to the next generation.

- a. Capital dispersal: establishing partnership programs with other small to medium charities working overseas especially in Malawi and Ethiopia, through regular donations.
- b. Capital management: setting up investment accounts to further the Trust's policy for investing some of the future endowed funds for growth, income and social impact.

J.M. Patrick

Signed on behalf of all the trustees: John M Patrick, Chair Dated: 10 May 2023



CHARITY COMMISSION
FOR ENGLAND AND WALES

Patrick Family Trust

1180057

CC16a

Receipts and payments accounts

For the period from 01-Apr-22 To 31-Mar-23

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
A1 Receipts					
Donations received	15,000	-	-	15,000	-
Bank interest	41	-	-	41	1
Fund-raising	-	-	-	-	-
Sub total (Gross income for AR)	15,041	-	-	15,041	1
A2 Asset and investment sales					
Sub total	-	-	-	-	-
Total receipts	15,041	-	-	15,041	1
A3 Payments					
Donations - UK	700	-	-	700	500
Donations - Overseas	6,200	-	-	6,200	12,800
Office & banking costs	-	-	-	-	-
Sub total	6,900	-	-	6,900	13,300
A4 Asset and investment purchases					
Sub total	-	-	-	-	-
Total payments	6,900	-	-	6,900	13,300
Net of receipts/(payments)	8,141	-	-	8,141	- 13,299
A5 Transfers between funds					
	-	-	-	-	-
A6 Cash funds last year end					
	416	-	-	416	13,715
Cash funds this year end					
	8,557	-	-	8,557	416

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	NatWest Current account	28	-	-
	NatWest Reserve account	8,529	-	-
	Total cash funds	8,557	-	-

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

Signature	Print Name	Date of approval
J.M. Patrick	Dr J M Patrick	
Janet Patrick	Mrs Janet Patrick	

No guarantee has been given by the CIO, where any potential liability under the guarantee is outstanding at the date of the statement of assets and liabilities by the CIO and which is secured by an express charge on any of the assets of the CIO.

There is no debt outstanding at the date of the statement of assets and liabilities which is owed by the CIO and which is secured by an express charge on any of the assets of the CIO.

PATRICK FAMILY TRUST

England & Wales - Charity number 1180057

Accounts

Patrick Family Trust

ANNUAL REPORT FOR THE FINANCIAL YEAR ENDING 31st MARCH 2022

Governance and Administration:

The Patrick Family Trust CIO (Charity Registration No.1180057) is a Charitable Incorporated Organisation whose principal address is 16 Devonshire Avenue, Beeston, Nottingham NG9 1BS, and which is regulated by a Constitution dated 24th September 2018.

The charity's aims are to advance such charitable purposes for the public benefit, primarily but not exclusively in the UK and in Malawi and Ethiopia, as are exclusively charitable according to the laws of England and Wales as the trustees may from time to time determine, in particular, but not limited to

- [a] education and training,
- [b] overseas aid and disaster relief,
- [c] community development, and
- [d] support of marginalised people including prisoners, disabled and migrants.

The trustees throughout the year have been:

Dr John M Patrick [Founder; Chair]

Mrs Janet Patrick [Founder]

Mr David Patrick

Mr Jonathan Patrick

Mr Daniel Patrick

Mr Joseph Patrick

The trustees have not met formally since the start of the COVID-pandemic, but have kept in touch informally.

Assets and Liabilities:

The charity holds no assets besides the funds in its NatWest bank accounts including an interest-earning Reserve Fund.

Reserves Policy:

We make grants and donations solely out of banked funds and do not commit beyond that limit. We incur minimal administrative costs and pay no salaries.

Activities during 2021-22:

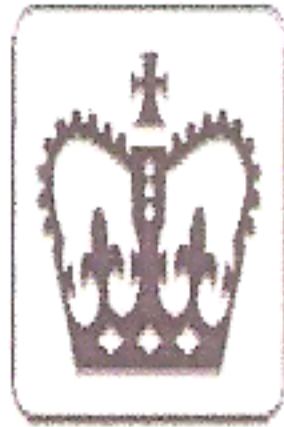
The trustees have had regard to the guidance issued by the Charity Commission on public benefit.

In 2021-22 we made grants totalling £13,300 primarily to African countries and Afghanistan, and mostly for medical and humanitarian projects related to the current conflicts in Afghanistan and Ukraine.

Summary of countries 2021-22			Summary of Sectors 2021-22		
Afghanistan	£ 4,500	34%	Medical	£ 5,900	44%
Malawi	£ 2,800	21%	Humanitarian	£ 4,300	32%
Ethiopia	£ 2,600	20%	Education	£ 1,500	11%
Ukraine	£ 2,100	16%	Agricultural	£ 800	6%
Zimbabwe	£ 800	6%	Finance	£ 800	6%
UK	£ 500	4%			

Signed on behalf of all the trustees: John M Patrick, Chair
June 2022

Dated:



Patrick Family Trust		1180057	CC16a
Receipts and payments accounts			
For the period from	01-Apr-21	to	

Section A Receipts and payments

	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £	Total funds to nearest £	Last year to nearest £
A1 Receipts					
Donations received	-	-	-	-	-
Bank interest	1	-	-	1	11
Fund-raising	-	-	-	-	-
A2 Asset and investment sales					
<i>Sub total</i>	-	-	-	-	-
Total receipts	1	-	-	1	11
A3 Payments					
Donations - UK	500	-	-	500	1,300
Donations - Overseas	12,800	-	-	12,800	15,756
Project admin costs - UK	-	-	-	-	-
Project admin costs - Overseas	-	-	-	-	-
Office & banking costs	-	-	-	-	-
<i>Sub total</i>	13,300	-	-	13,300	17,056
A4 Asset and investment purchases					
<i>Sub total</i>	-	-	-	-	-
Total payments	13,300	-	-	13,300	17,056
<i>Net of receipts/(payments)</i>	- 13,299	-	-	- 13,299	- 17,045
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	13,715	-	-	13,715	30,760
Cash funds this year end	416	-	-	416	13,715

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

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds			
NatWest Current account	28	-	-
NatWest Reserve account	388	-	-
Total cash funds	416	-	-

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

Signature	Print Name	Date of approval
J.M. Patrick	Dr J M Patrick	22/6/22
Janet Patrick	Mrs Janet Patrick	22/6/22

Notes:

No guarantee has been given by the CIO, where any potential liability under the guarantee is outstanding at the date of the statement of assets and liabilities by the CIO and which is secured by an express charge on any of the assets of the CIO.

There is **no debt** outstanding at the date of the statement of assets and liabilities which is owed by the CIO and which is secured by an express charge on any of the assets of the CIO.

PATRICK FAMILY TRUST

England & Wales - Charity number 1180057

Accounts

Patrick Family Trust

Report for April 2020 - March 2021; third year of operation

Governance and Administration:

The Patrick Family Trust CIO (Charity Registration No.1180057) is a Charitable Incorporated Organisation whose principal address is 16 Devonshire Avenue, Beeston, Nottingham NG9 1BS, and which is regulated by a Constitution dated 24th September 2018.

The charity's aims are to advance such charitable purposes for the public benefit, primarily but not exclusively in the UK and in Malawi and Ethiopia, as are exclusively charitable according to the laws of England and Wales as the trustees may from time to time determine, in particular, but not limited to

- [a] education and training,
- [b] overseas aid and disaster relief,
- [c] community development, and
- [d] support of marginalised people including prisoners, disabled and migrants.

The trustees throughout the year have been:

Dr John M Patrick [Founder; Chair]
Mrs Janet Patrick [Founder]
Mr David Patrick

Mr Jonathan Patrick
Mr Daniel Patrick
Mr Joseph Patrick

The trust is managed by the founders in consultation with the other trustees. They were unable to meet in 2020-21 during the COVID-pandemic shutdown, but kept in touch informally. If and when the Trust needs to replace trustees or appoint new ones, we will have regard to the skills, knowledge and experience needed for the effective administration of our CIO.

Assets and Liabilities:

The Trust holds no assets besides the funds in its NatWest current account and NatWest interest-earning Reserve Account.

Reserves Policy:

The Trust make grants and donations solely out of banked funds and does not commit beyond that limit. We incur minimal administrative costs and pay no salaries.

Activities during 2020-21:

The trustees have had regard to the guidance issued by the Charity Commission on public benefit.

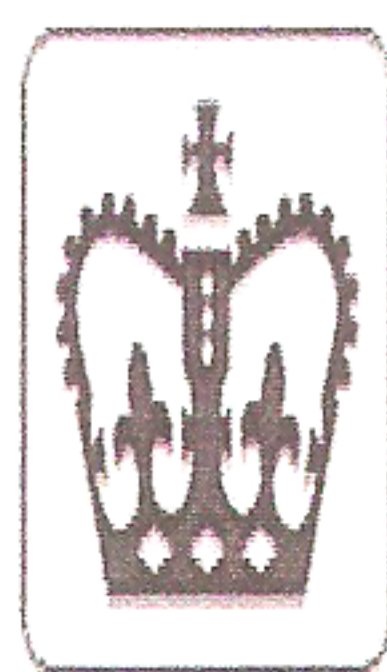
In 2020-21 the Trust made grants totalling around £17,000 in two broad categories:

- donations to UK charities in the fields of education and COVID-19 pandemic response [8%].
- donations to UK charities operating primarily in less developed countries in Africa [92%], with an emphasis on responses to the pandemic in communities. As part of this, we continued our sponsorship of The Big Give fund-matching Christmas Appeal.

The Trust gave no further financial support to the community horticultural project in southern Malawi that was started last year.

Signed on behalf of all the trustees: John M Patrick, Chair
August 31 2021

Dated:



CHARITY COMMISSION
FOR ENGLAND AND WALES

Patrick Family Trust

1180057

CC16a

Receipts and payments accounts

For the period from 01-Apr-20 to 31-Mar-21

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
A1 Receipts					
Donations received	-	-	-	-	220
Bank interest	11	-	-	11	60
Fund-raising	-	-	-	-	265
Sub total (Gross income for AR)	11	-	-	11	545
A2 Asset and investment sales	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	11	-	-	11	545
A3 Payments					
Donations - UK	1,300	-	-	1,300	1,515
Donations - Overseas	15,756	-	-	15,756	16,220
Project admin costs - UK	-	-	-	-	-
Project admin costs - Overseas	-	-	-	-	1,818
Office & banking costs	-	-	-	-	200
Sub total	17,056	-	-	17,056	19,753
A4 Asset and investment purchases	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	17,056	-	-	17,056	19,753
Net of receipts/(payments)	- 17,045	-	-	- 17,045	- 19,208
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	30,760	-	-	30,760	49,968
Cash funds this year end	13,715	-	-	13,715	30,760

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

	Details	Unrestricted funds	Restricted funds	Endowment funds
B1 Cash funds	NatWest Current account	28	-	-
	NatWest Reserve account	13,687	-	-
	Total cash funds	13,715	-	-
B5 Liabilities	Nil	-	-	-
Signed by the founding trustees on behalf of all the trustees:	<i>J.M. Patrick</i>	Dr J M Patrick		31-Aug-21
	<i>Janet Patrick</i>	Mrs Janet Patrick		31-Aug-21

Notes:

No guarantee has been given by the CIO, where any potential liability under the guarantee is outstanding at the date of the statement of assets and liabilities by the CIO and which is secured by an express charge on any of the assets of the CIO.

There is no debt outstanding at the date of the statement of assets and liabilities which is owed by the CIO and which is secured by an express charge on any of the assets of the CIO.