OLD STOIC BENEVOLENT TRUST

England & Wales · Charity number 1180214

Details

Status	Registered
Legal form	CIO
Registered	2018-10-05
Register	View on the Charity Commission register

Contact

Address	Old Stoic Office Stowe School Buckingham MK18 5EH
Phone	01280818252

Activities

Objects: THE PREVENTION AND RELIEF OF POVERTY AND FINANCIAL HARDSHIP OF THE FOLLOWING:1.FORMER PUPILS OF STOWE SCHOOL;2.FORMER PERMANENT MEMBERS OF STAFF OF STOWE SCHOOL; 3.IMMEDIATE DEPENDENTS OF PERSONS DESCRIBED IN 3(1) AND 3(2) ABOVE.

Activities: The charity provides support for former pupils and staff of Stowe School and their dependants

Classification

- **How:** Makes Grants To Individuals, Provides Advocacy/advice/information
- **What:** Disability, The Prevention Or Relief Of Poverty
- **Who:** Other Defined Groups

Downloaded from opencharities.uk/ew/1180214

Geography

- Guernsey
- Ireland
- Isle Of Man
- Jersey
- Kenya
- Malaysia
- Northern Ireland
- Scotland
- Switzerland
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2024-11-30	£241	£4,025	-	-
2023-11-30	£117	£1,690	-	-
2022-11-30	£2,680	£3,180	-	-
2021-11-30	£3,000	£500	-	-
2020-11-30	£4,042	£0	-	-

Trustees

Name	Role	Appointed
SIMON SHNEERSON	Chair	2017-11-10
HENRY KIMBELL		2017-11-10
Paul Burgess		2024-10-15
Talulla Rendall		2024-10-15

Downloaded from opencharities.uk/ew/1180214

OLD STOIC BENEVOLENT TRUST

England & Wales - Charity number 1180214

Accounts

CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report
for the period from 1 December 2023 to 30 November 2024

Charity name: **Old Stoic Benevolent Trust**

Charity registration number: **1180214**

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The Old Stoic Benevolent Trust exists for the prevention and relief of poverty and financial hardship of the following: 1. Former pupils of Stowe School 2. Former permanent members of staff of Stowe School 3. Immediate dependents of persons described in 1 and 2 above
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	The Trust provides modest grants, advice and support to relieve poverty and hardship. We respond to individual situations and provide personalised help as appropriate.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Yes

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	The Charity was established in 2018 and has been setting up its services and communicating its availability. During the year, we continued to send out regular offers of support via social media and through Stowe School's email and printed communications. In the year to November 2024, we have again helped a number of Old Stoics with grants and/or practical support, in line with our objects of addressing individual cases of need and poverty. In fact we have given out more than twice as much in financial grants.

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	During the financial year the charity separated its banking from Stowe School and the balances were moved to a charity account at NatWest. At 30.11.2024 the Charity had a positive balance of £13,643 at NatWest. As mentioned above, grants totalling £4025 were awarded during this financial period, double the previous year. There were no Trustee expenses and no admin expenses. Significant amounts of volunteer time and home office facilities were used at no cost. We acknowledge gratefully the active support of Stowe School, the Old Stoic Society and their staff.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We do not hold formal reserves. Funds at year end consist of remaining balances, held in order to provide for future requests for support. Following the pandemic we have seen more requests for our support, and we anticipate a growing need for our help.
Amount of reserves held	Para 1.22	Year-end balance £13,643.
Reasons for holding zero reserves	Para 1.22	-
Details of fund materially in deficit	Para 1.24	-
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	-

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document	Para 1.25	Foundation Model constitution for a CIO
How is the charity constituted?	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustees are appointed for three-year terms and there is a minimum number of three Trustees. Trustees would normally be former pupils of Stowe School, as are the present Trustees.

Reference and Administrative details

Charity name	Old Stoic Benevolent Trust
Other name the charity uses	-
Registered charity number	1180214
Charity's principal address	Old Stoic Office Stowe School Buckingham MK18 5EH

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	S L Shneerson	Chair		
2	J C W Hall		Until 15.10.24	
3	H Kimbell			
4	P Burgess		From 15.10.24	
5	T Rendall		From 15.10.24	

Corporate trustees – names of the directors at the date the report was approved

Director name		
NONE		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
NONE		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	-
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	-
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	-

Exemptions from disclosure

Reason for non-disclosure of key personnel details

-

Other optional information

-

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Simon SHNEERSON	
Position (eg Secretary, Chair, etc)	Chair	
Date	11 September 2025	

CHARITY COMMISSION FOR ENGLAND AND WALES

Charity Name	No (if any)
Old Stoic Benevolent Trust	1180214

Receipts and payments accounts

CC16a

For the period from	Period start date 01-Dec-23	To	Period end date 30-Nov-24

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Old Stoic Society - annual donation	-	-	-	-	-
Bank interest	241			241	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
***Sub total** (Gross income for AR)*	241	-	-	241	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	241	-	-	241	-
A3 Payments					
Grants	4,025	-	-	4,025	-
Expenses	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	4,025	-	-	4,025	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	4,025	-	-	4,025	-
Net of receipts/(payments)	- 3,784	-	-	- 3,784	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	17,427	-	-	17,427	-
Cash funds this year end	13,643	-	-	13,643	-

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

B1 Cash funds

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	Deposit account	13,638	-	-
	Current account	5	-	-
		-	-	-
	Total cash funds	13,643	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
None	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
None		-	-
		-	-
		-	-
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
None		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
None		-	
		-	
		-	
		-	
		-	

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

Signature	Print Name	Date of approval
	Simon Shneerson	10/09/2025

OLD STOIC BENEVOLENT TRUST

England & Wales - Charity number 1180214

Accounts

CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report
for the period from 1 December 2022 to 30 November 2023

Charity name: **Old Stoic Benevolent Trust**

Charity registration number: **1180214**

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The Old Stoic Benevolent Trust exists for the prevention and relief of poverty and financial hardship of the following: 1. Former pupils of Stowe School 2. Former permanent members of staff of Stowe School 3. Immediate dependents of persons described in 1 and 2 above
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	The Trust provides modest grants, advice and support to relieve poverty and hardship. We respond to individual situations and provide personalised help as appropriate.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Yes

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	The Charity was established in 2018 and has been setting up its services and communicating its availability. The pandemic made it almost impossible for us to develop the relationships and the awareness we wanted, but we are now moving forward again. During the year, we continued to send out regular offers of support via social media and through Stowe School's email and printed communications. In the year to November 2023, we have helped a number of Old Stoics with grants and/or practical support, in line with our objects of addressing individual cases of need and poverty. This included two emergency grants in cases of particular need.

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	During the financial year the charity separated its banking from Stowe School and the balances were moved to a charity account at NatWest. At 30.11.2023 the Charity had a positive balance of £17,427 at NatWest. As mentioned above, grants totalling £1690 were awarded during this financial period. There were no Trustee expenses and no admin expenses. Significant amounts of volunteer time and home office facilities were used at no cost. We acknowledge gratefully the active support of Stowe School, the Old Stoic Society and their staff.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We do not hold formal reserves. Funds at year end consist of remaining balances, held in order to provide for future requests for support. Following the pandemic we have seen more requests for our support, and we anticipate a growing need for our help.
Amount of reserves held	Para 1.22	Year-end balance £17,427.
Reasons for holding zero reserves	Para 1.22	-
Details of fund materially in deficit	Para 1.24	-
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	-

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document	Para 1.25	Foundation Model constitution for a CIO
How is the charity constituted?	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustees are appointed for three-year terms and there is a minimum number of three Trustees. Trustees would normally be former pupils of Stowe School, as are the present Trustees.

Reference and Administrative details

Charity name	Old Stoic Benevolent Trust
Other name the charity uses	-
Registered charity number	1180214
Charity's principal address	Old Stoic Office Stowe School Buckingham MK18 5EH

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	S L Shneerson	Chair		
2	J C W Hall			
3	H Kimbell			
4	-			
5				

Corporate trustees – names of the directors at the date the report was approved

Director name		
NONE		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
NONE		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	-
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	-
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	-

Exemptions from disclosure

Reason for non-disclosure of key personnel details

-

Other optional information

-

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Simon SHNEERSON	
Position (eg Secretary, Chair, etc)	Chair	
Date	17 September 2024	

CHARITY COMMISSION FOR ENGLAND AND WALES

Charity Name	No (if any)
Old Stoic Benevolent Trust	1180214

Receipts and payments accounts

CC16a

For the period from	Period start date 01-Dec-22	To	Period end date 30-Nov-23

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Old Stoic Society - annual donation	-	-	-	-	-
Bank interest	117			117	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
***Sub total** (Gross income for AR)*	117	-	-	117	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	117	-	-	117	-
A3 Payments					
Grants	1,690	-	-	1,690	-
Expenses	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	1,690	-	-	1,690	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	1,690	-	-	1,690	-
Net of receipts/(payments)	- 1,573	-	-	- 1,573	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	19,000	-	-	19,000	-
Cash funds this year end	17,427	-	-	17,427	-

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

B1 Cash funds

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	Deposit account	17,422	-	-
	Current account	5	-	-
		-	-	-
	Total cash funds	17,427	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
None	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
None		-	-
		-	-
		-	-
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
None		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
None		-	
		-	
		-	
		-	
		-	

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

Signature	Print Name	Date of approval
	Simon Shneerson	17/09/2024

OLD STOIC BENEVOLENT TRUST

England & Wales - Charity number 1180214

Accounts

CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report
for the period from 1 December 2021 to 30 November 2022

Charity name: **Old Stoic Benevolent Trust**

Charity registration number: **1180214**

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The Old Stoic Benevolent Trust exists for the prevention and relief of poverty and financial hardship of the following: 1. Former pupils of Stowe School 2. Former permanent members of staff of Stowe School 3. Immediate dependents of persons described in 1 and 2 above
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	The Trust provides modest grants, advice and support to relieve poverty and hardship. We respond to individual situations and provide personalised help as appropriate.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Yes

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	The Charity was established in 2018 and has been setting up its services and communicating its availability. The pandemic made it almost impossible for us to develop the relationships and the awareness we wanted, but we are now moving forward again. During the year, we continued to send out regular offers of support via social media and through Stowe School's email and printed communications. Our national network of volunteer local representatives was put on hold as the pandemic continued but remains in place and will be increasingly important as our activities build up. In the year to November 2022, we have helped a larger number of Old Stoics with grants and/or practical support, in line with our objects of addressing individual cases of need and poverty. During the financial year we awarded six emergency grants of £500 in cases of particular need.

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	At 30.11.2022 the Charity had a positive balance of £19,000, held on its behalf within the Old Stoic Society's account at Stowe School. Income during the period consisted of a 2022 grant of £2,180 from the Old Stoic Society, plus a grant cheque from 2021 that was returned unpaid to the OS Society. As mentioned above, grants totalling £3000 were awarded during this financial period. Stowe's Old Stoic Society underwent a rebranding in 2021 and the charity was charged £180 for a new logo to align with this. The OS Society included reimbursement of this sum in its donation to the charity. There were no Trustee expenses and no admin expenses. Significant amounts of volunteer time and home office facilities were used at no cost. We acknowledge gratefully the active support of Stowe School, the Old Stoic Society and their staff.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We do not hold formal reserves. Funds at year end consist of remaining balances, held in order to provide for future requests for support. Following the pandemic we have seen more requests for our support, and we anticipate a growing need for our help.
Amount of reserves held	Para 1.22	Year-end balance £19,000
Reasons for holding zero reserves	Para 1.22	-
Details of fund materially in deficit	Para 1.24	-
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	-

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document	Para 1.25	Foundation Model constitution for a CIO
How is the charity constituted?	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustees are appointed for three-year terms and there is a minimum number of three Trustees. Trustees would normally be former pupils of Stowe School, as are the present Trustees.

Reference and Administrative details

Charity name	Old Stoic Benevolent Trust
Other name the charity uses	-
Registered charity number	1180214
Charity's principal address	Old Stoic Office Stowe School Buckingham MK18 5EH

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	S L Shneerson	Chair		
2	J C W Hall			
3	H Kimbell			
4	-			
5				

Corporate trustees – names of the directors at the date the report was approved

Director name		
NONE		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
NONE		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	-
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	-
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	-

Exemptions from disclosure

Reason for non-disclosure of key personnel details

-

Other optional information

-

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Simon SHNEERSON	
Position (eg Secretary, Chair, etc)	Chair	
Date	20 July 2023	

CHARITY COMMISSION FOR ENGLAND AND WALES

Charity Name	No (if any)
Old Stoic Benevolent Trust	1180214

Receipts and payments accounts

CC16a

For the period from	Period start date 01-Dec-21	To	Period end date 30-Nov-22

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Old Stoic Society - annual donation	2,180	-	-	2,180	-
OS Society - adjustment - unpaid grant cheque (2021)	500	-	-	500	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
***Sub total** (Gross income for AR)*	2,680	-	-	2,680	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	2,680	-	-	2,680	-
A3 Payments					
Grants	3,000	-	-	3,000	-
Expenses	180	-	-	180	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	3,180	-	-	3,180	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	3,180	-	-	3,180	-
Net of receipts/(payments)	- 500	-	-	- 500	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	19,500	-	-	19,500	-
Cash funds this year end	19,000	-	-	19,000	-

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

B1 Cash funds

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	Cash balance (held on our behalf by Old Stoic Society)	19,000	-	-
		-	-	-
		-	-	-
	Total cash funds	**19,000**	**-**	**-**
	(agree balances with receipts and payments account(s))	OK	OK	OK

B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
None	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
None		-	-
		-	-
		-	-
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
None		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
None		-	
		-	
		-	
		-	
		-	

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

Signature	Print Name	Date of approval
	Simon Shneerson	20/07/2023

OLD STOIC BENEVOLENT TRUST

England & Wales - Charity number 1180214

Accounts

CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report
for the period from 1 December 2020 to 30 November 2021

Charity name: **Old Stoic Benevolent Trust**

Charity registration number: **1180214**

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The Old Stoic Benevolent Trust exists for the prevention and relief of poverty and financial hardship of the following: **1.** Former pupils of Stowe School **2.** Former permanent members of staff of Stowe School **3.** Immediate dependents of persons described in 1 and 2 above
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	The Trust provides modest grants, advice and support to relieve poverty and hardship. We respond to individual situations and provide personalised help as appropriate.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Yes

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	The Charity was established in 2018 and has been setting up its services and communicating its availability. It has also been exploring the need for its services and the best ways of providing them. We have helped a number of Old Stoics with grants and/or practical support, in line with our objects and addressing individual cases of need and poverty. Our work in 2021 continued to be affected by Covid-19. This again prevented many of the face to face conversations that might have helped us identify people in need, either directly or by putting the word out. We continued to send out regular offers of support via social media and through the school's email and printed communications. During the financial year we gave advice and support on a number of occasions, and awarded a financial grant of £500 to one person who was in particular need. This was a financial lifeline to them. Our national network of volunteer local representatives was invited to an inaugural online meeting to discuss what we can offer and how they might provide support. The network continues to develop.

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	At 30.11.2021 the Charity had a positive balance of £19,500, held on its behalf within the Old Stoic Society's accounts at Stowe School. Income during the period consisted of a 2020 grant of £3000 from the Old Stoic Society. As mentioned above, one grant of £500, the maximum under our grants policy, was awarded during this financial period. There were no Trustee or other expenses. Significant amounts of volunteer time and home office facilities were used at no cost, and we acknowledge gratefully the active support of Stowe School, the Old Stoic Society and their staff.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We do not hold formal reserves. Funds at year end consist of remaining balances from annual donations. The impacts of Covid are likely to lead to more requests for our support, and we anticipate a growing need for our help.
Amount of reserves held	Para 1.22	Year-end balance £19,500
Reasons for holding zero reserves	Para 1.22	-
Details of fund materially in deficit	Para 1.24	-
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	-

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document	Para 1.25	Foundation Model constitution for a CIO
How is the charity constituted?	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustees are appointed for three-year terms and there is a minimum number of three Trustees. Trustees would normally be former pupils of Stowe School, as are the present Trustees.

Reference and Administrative details

Charity name	Old Stoic Benevolent Trust
Other name the charity uses	-
Registered charity number	1180214
Charity's principal address	Old Stoic Office Stowe School Buckingham MK18 5EH

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	S L Shneerson	Chair		
2	J C W Hall			
3	H Kimbell			
4	-			
5				

Corporate trustees – names of the directors at the date the report was approved

Director name		
NONE		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
NONE		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	-
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	-
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	-

Exemptions from disclosure

Reason for non-disclosure of key personnel details

-

Other optional information

-

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Simon SHNEERSON	
Position (eg Secretary, Chair, etc)	Chair	

Date 11 August 2022

CHARITY COMMISSION FOR ENGLAND AND WALES

Charity Name	No (if any)
Old Stoic Benevolent Trust	1180214

Receipts and payments accounts

For the period from	Period start date	To	Period end date
	1-Dec-20		30-Nov-21

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £
A1 Receipts				
OS Society annual donation	3,000	-	-	3,000
		-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
***Sub total** (Gross income for AR)*	3,000	-	-	3,000
A2 Asset and investment sales, (see table).				
	-	-	-	-
	-	-	-	-
Sub total	-	-	-	-
Total receipts	3,000	-	-	3,000
A3 Payments				
Grants	500	-	-	500
Expenses	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
Sub total	500	-	-	500
A4 Asset and investment purchases, (see table)				
	-	-	-	-
	-	-	-	-
Sub total	-	-	-	-
Total payments	500	-	-	500
Net of receipts/(payments)	2,500	-	-	2,500
A5 Transfers between funds	-	-	-	-
A6 Cash funds last year end	17,000	-	-	17,000
Cash funds this year end	19,500	-	-	19,500

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

B1 Cash funds

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £
	Cash balance (held on our behalf by Old Stoic Society)	19,500	-
		-	-
		-	-
	Total cash funds	19,500	-
	(agree balances with receipts and payments account(s))	OK	OK

B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £
None	-	-
	-	-
	-	-
	-	-
	-	-
	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)
None		-
		-
		-
		-
		-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)
None		-
		-
		-
		-
		-
		-
		-
		-
		-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)
None		-
		-
		-
		-
		-

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

Signature	Print Name
	Simon Shneerson

CC16a

[redacted]

Last year

to the nearest £

-
-
-
-
-
-
-
-
-

-
-

-

-
-
-
-
-
-
-
-
-

-

-

-
-
-
-

[redacted]

Endowment funds

to nearest £

-
-
-
-

OK

Endowment funds

to nearest £

-
-
-
-
-
-

Current value (optional)

-
-
-
-
-

Current value (optional)

-
-
-
-
-
-
-
-
-

When due (optional)

Date of approval
8/11/2022

OLD STOIC BENEVOLENT TRUST

England & Wales - Charity number 1180214

Accounts

CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report
for the period from 1 December 2019 to 30 November 2020

Charity name: **Old Stoic Benevolent Trust**

Charity registration number: **1180214**

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The Old Stoic Benevolent Trust exists for the prevention and relief of poverty and financial hardship of the following: 1. Former pupils of Stowe School 2. Former permanent members of staff of Stowe School 3. Immediate dependents of persons described in 1 and 2 above
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	The Trust provides modest grants, advice and support to relieve poverty and hardship. We respond to individual situations and provide personalised help as appropriate.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Yes

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	The Charity was established in 2018 and has been setting up its services and communicating its availability. It has also been exploring the need for its services and the best ways of providing them. We have helped a number of Old Stoics with grants and/or practical support, in line with our objects and addressing individual cases of need and poverty. Our work in 2020 was greatly affected by Covid-19 because of our reliance on Stowe School to help us identify former pupils in need. The school furloughed most of its admin staff and alumni events and most activities were paused, so there were far fewer communications between alumni and the school. This reduced requests for help and prevented the conversations that might have helped us identify people in need, either directly or by putting the word out. We did however issue regular offers of support via social media and through the school's generic email and printed communications to raise our profile, and were able to respond accordingly. During the 2020 financial year we gave advice and support on a number of occasions, but no financial grants were awarded. We have been establishing a national network of local representatives (volunteers) in order to give potential clients a local contact who can provide more individualised attention. This network will now be more proactive than was originally envisaged.

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	At 30.11.2020 the Charity had a positive balance of £17,000, held on its behalf within the Old Stoic Society's accounts at Stowe School. Income during the period consisted of a 2020 grant of £4041 from the Old Stoic Society. As mentioned above, no grants were awarded during this financial period and there were no Trustee or other expenses. Significant amounts of volunteer time and home office facilities were used at no cost.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We do not hold formal reserves. Funds at year end consist of remaining balances from annual donations. The impacts of Covid are likely to lead to even more requests for our support, and we anticipate a growing need for our help.
Amount of reserves held	Para 1.22	Year-end balance £17,000
Reasons for holding zero reserves	Para 1.22	-
Details of fund materially in deficit	Para 1.24	-
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	-

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document	Para 1.25	Foundation Model constitution for a CIO
How is the charity constituted?	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustees are appointed for three-year terms and there is a minimum number of three Trustees. Trustees would normally be former pupils of Stowe School, as are the present Trustees.

Reference and Administrative details

Charity name	Old Stoic Benevolent Trust
Other name the charity uses	-
Registered charity number	1180214
Charity's principal address	Old Stoic Office Stowe School Buckingham MK18 5EH

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	S L Shneerson	Chair		
2	J C W Hall			
3	H Kimbell			
4	-			
5				

Corporate trustees – names of the directors at the date the report was approved

Director name		
NONE		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
NONE		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	-
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	-
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	-

Exemptions from disclosure

Reason for non-disclosure of key personnel details

-

Other optional information

-

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Simon SHNEERSON	
Position (eg Secretary, Chair, etc)	Chair	

Date	21 September 2021

CHARITY COMMISSION FOR ENGLAND AND WALES

Charity Name	No (if any)
Old Stoic Benevolent Trust	1180214

Receipts and payments accounts

CC16a

For the period from	Period start date	To	Period end date
	01-Dec-19		30-Nov-20

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					
OS Society's 2019 donation	4,042	-	-	4,042	-
		-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total *(Gross income for AR)*	4,042	-	-	4,042	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	4,042	-	-	4,042	-
A3 Payments					
Grants	-	-	-	-	-
Expenses	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	-	-	-	-	-
Net of receipts/(payments)	4,042	-	-	4,042	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	12,958	-	-	12,958	-
Cash funds this year end	17,000	-	-	17,000	-

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

B1 Cash funds

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	Cash balance (held on our behalf by Old Stoic Society)	17,000	-	-
		-	-	-
		-	-	-
	Total cash funds	**17,000**	**-**	**-**
	(agree balances with receipts and payments account(s))	OK	OK	OK

B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
None	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
None		-	-
		-	-
		-	-
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
None		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
None		-	
		-	
		-	
		-	
		-	

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

Signature	Print Name	Date of approval
	Simon Shneerson	21/09/2021