

# PHOENIX LIFESTYLE FOUNDATION

England & Wales · Charity number 1186727

## Details

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**Status** Registered

**Legal form** CIO

**Registered** 2019-12-04

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

## Contact

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**Address** 4 Fernside  
Great Kingshill  
High Wycombe  
Buckinghamshire  
HP15 6HN

**Phone** 07861966066

**Email** [phoenixlifestyleinnovations@outlook.com](mailto:phoenixlifestyleinnovations@outlook.com)

## Activities

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**Objects:** TO RELIEVE THE NEEDS OF THOSE WITH MENTAL HEALTH ISSUES AND THOSE RECOVERING FROM DRUG AND ALCOHOL ADDICTIONS BY THE PROVISION OF FACILITIES FOR TRAINING, MENTORING AND GROUP EXERCISE DESIGNED TO IMPROVE THEIR CONDITIONS OF LIFE AND PROMOTE AND PROTECT THEIR PHYSICAL AND MENTAL HEALTH

**Activities:** The charity directly addresses the benefits of group physical exercise, circuit training, low intensity, high intensity and relaxation techniques by qualified instructor, to help counter the impact and effects of drug or alcohol addiction, anxiety and low self esteem. Additionally we provide mentoring and access to certified counselling and therapy to develop self worth and aid relapse prevention

## Classification

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- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** The Advancement Of Health Or Saving Of Lives, Disability
- **Who:** Children/young People, Elderly/old People, People With Disabilities, People Of A Particular Ethnic Or Racial Origin, Other Charities Or Voluntary Bodies, The General Public/mankind

## Geography

- Buckinghamshire

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-02-08		£0	£0	-
2024-02-08		£0	£0	-
2023-02-08		£916	£0	-
2022-02-08		£192	£5	-
2021-02-08		£800	£0	-

## Trustees

Name	Role	Appointed
<b>CHARMAIN CLAYTON</b>	Chair	2025-03-07
Hannah Williams		2025-03-07
Rachel Frances Thomson		2025-07-18

**PHOENIX LIFESTYLE FOUNDATION**

England & Wales - Charity number 1186727

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# Accounts

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# PHOENIX LIFESTYLE FOUNDATION

## Charity Number 1186727

Trustee Annual Report for the period 24 December 2024 - 7  
December 2025

The trustees Charmain Clayton (Chair) Hannah Williams, Miss Rachel Frances Thomson and C.o Lewis Baker, are delighted to present the annual report for the period concluding on 7 December 2025. The trustees bear the responsibility for the governance of the charity, ensuring its effective operation in pursuit of its charitable aims.

The charity's primary objective is to relieve the needs of individuals experiencing mental health challenges and those who re in recovery from addictions. This is achieved through the provision of facilities for training, mentoring and group physical exercise, all designed to improve their quality of life and promote and protect their physical and mental well being.

During this reporting period, our focus has been

Become more established in our local area and promote our services

Appoint another trustee

Build website

Expand our network

Review of Activities

Our sober running group **Wellness warriors on the run** has enjoyed another successful year, with the provision of 2 waves four couch to 5 k program.

The decision to only provide 2 this year was based on the previous year, We found that no-one came out for the summer wave last year. The partnership with Buckinghamshire University is still in place and they are responsible for the fundraising (there figures submitted in the return dont reflect these, but will be provided here)

During the summer break we focussed more on group activity for the runners who've stayed on after their wave has finished. This involved going to the local Park Monday and Fridays and sometimes we played games like rounders, and others we had ore of a bootcamp style workout, These seemed to work quite well and clients enjoyed it. As a result we will be providing the opportunity for one of our volunteers to get a level 2 gym instructor Qualification. This will legally allow them to deliver these sessions.

Our mens group had a really good first year. We averaged 11 men a week. We rent a hall, provide physical activity sessions for the men who want it, for those who don't, we have a few games and have regular discussions. We provide teas and coffee and biscuits. We offer a safe space that's non judgemental for fellas to come.

Again, the expenses of this group weren't in the annual accounts but will be provided here. This group has its own bank account that pays for the hall and refreshments..

## Achievements and performance

### Wellness warriors on the run

This year we had a few events. We had the two end of wave races that we put the runners through, as usual, these were really well supported. We had 2 celebratory meals for the respective waves. It was nice to be able to celebrate with the runners.

We had an event that was intended to raise funds as well as to promote the group the groups . The event was a 24 hr 5k relay race. With one runner on a treadmill at a time running 5 k. It was a great success, we did it at the university and invited local radio and press. We invited members of the local police and fire brigade and students and lecturers from the uni. Then majority of the runners were from the group.

We received £1121.63 in total for illness warriors, and these came in the way of donations.

We spent £2509.76 in total for the year. This was on t shirts, race entry, dbs (plus training and membership to England Athletics).

The closing Balance of this account is £2334.80

### Brothers In arms

A solid first year. We were lucky enough to get the first 6 months hall hire for nothing as the local parish council were keen to support us.

We were given a £500 donation and we used half the money from the running event ( £276.00)

We have spent £680.81 and that has been on hall costs and banking charges (refreshments have been provided by donation).

The closing balance of this account is £95.19

## Phoenix lifestyle foundation

We have added a new trustee, mis Rachel Frances Thompson

## Hazlemere Fete

This year we had 2 events where we focussed on the charity and not the individual projects. The first event we did was to have a stall at the local fete. This was a great opportunity to showcase the charity and the 2 groups we run. We were involved in the setting up of the event and our stall we had a few games and a few of our members talking about the great work we do. Although we didn't raise any money, we had a few people sign on to the groups as a result. We have been invited next year and have a more prominent role. We have been asked to deliver a tug of war and a fitness class. We were lucky enough to have promotional banners and branded table dressings donated to us

## C.i.m.p.s.a Annual Conference

The Chartered institute for the Management of sport and Physical Activity serves as the governing body for the uk's sport and physical activity sector, setting standards, endorses qualifications and supports professionals to raise industry quality and inspire public activity. They heard about the work that Phoenix does and invited us to present at their annual conference in Leicester. To be given the opportunity to present to the peers in our industry was really important. I believe this will add gravitas to future grant applications.

## Networking events

We have been to many networking events this year, and have made a lot of connections in local government, gp and drug services and the local professionals. This will help grow and develop as an organisation in the next few years

## Financial Review

Phoenix hasn't accessed any of its unrestricted funds, although we are due to pay for the level 2 qualification. Funds were also earmarked to pay for a website, we have however, found someone who has built us one for free, We rely on volunteers and as yet no one is drawing a wage from Phoenix, although the long term goal is for this to be a full-time job for the certain job roles the charity need to grow and become sustainable.  
Closing balance £906.50

## Structure, governance and management

Phoenix Lifestyle foundation is a charitable incorporated Organisation (Cio) governed by its constitution. Our charitable objectives, as registered with the charity commission are to “relieve the needs of individuals experiencing mental health challenges and those recovering from drug and alcohol addiction by providing facilities for training, mentoring and group exercise designed to improve their conditions of life and promote and protect their physical and mental health. The trustees are responsible for the overall governance, strategic direction, and legal compliance for the charity. The ceo is responsible for day to day management and operational delivery of the charities activities, currently including the direct delivery of projects and sessions.

During this reporting period we have continued to deliver the sessions highlighted. We have a new website and are focussing on the steady growth that we have enjoyed this year, although we have faced some operational challenges, notably banking. We will seek ways to make this side of the charity far more efficient. Brothers in arms didn't have a bank account until June. Lewis Baker paid for the rent due for the hall out of his pocket, the balancing payment came out of the bank account on September 29 for the sum of £224.85. (there was also a banking error that saw Lewis Baker add £240 to the Brothers In Arms account, and then when the error was recognised the bank account paid it straight back.

We will continue to meet monthly on line and have 1 annual general meeting which will be held once all trustees are available. The desired outcomes for the coming year are-

### Fundraising

Continue the steady growth we have enjoyed this year

Develop systems to make the running of the charity more efficient .

### Declaration

All trustees have approved the report and are satisfied that it provides a fair and accurate representation of the activities and financial position of Phoenix Lifestyle Foundation for the reporting period

Charmain Clayton

Rachel Frances Thompson

Hannah Williams

Lewis Baker



**PHOENIX LIFESTYLE FOUNDATION**

England & Wales - Charity number 1186727

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# Accounts

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Phoenix Lifestyle Foundation (Charity Number 1186727)

Trustees' Annual Report for the period 24 December 2023 to 24 December 2024

The trustees, Clayton (Chair), Hannah Williams, and CEO Lewis Baker, are pleased to present their annual report for the period ending 24 December 2024. The trustees are responsible for the governance of the charity and ensuring its effective operation in pursuit of its charitable aims.

The Charity's primary objective is to relieve the needs of individuals experiencing mental health challenges and those in recovery from drug and alcohol addiction. This is achieved through the provision of facilities for training, mentoring, and group exercise, all designed to improve their quality of life and promote and protect their physical and mental well-being. During this reporting period, our focus has been on establishing a strong foundation for the charity and successfully launching two key projects that directly address our core objectives.

#### Objectives and Activities

For the period under review, the charity's principal objectives were:

- \* To establish a well-structured and effective board of trustees and robust operational procedures for the charity.
- \* To successfully launch and deliver two pilot projects: "Wellness Warriors on the Run," a sober running group, and "Brothers in Arms," a men's exercise and social club.

#### Review of Activities

##### Wellness Warriors on the Run:

This initiative represents the first dedicated sober running club in the South of the UK, inspired by the lived experience of our CEO, Lewis Baker, and the well-documented positive physiological impact of exercise on the brain. The program brings individuals in recovery together under the guidance of coaches with lived experience of overcoming addiction. By meeting three times a week for outdoor exercise, the project provides a vital peer support network and demonstrates the possibility of recovery through relatable role models. The outdoor setting is known to benefit mental health, and exercise releases endorphins, contributing to improved mood. The consistent meeting schedule helps to maintain engagement and reduce the likelihood of harmful behaviours.

The program follows the NHS "Couch to 5k" framework, ensuring a safe and progressive approach to building fitness. Upon completion of the nine-week program, participants are offered the opportunity to participate in an official race, providing a tangible sense of achievement and the reward of a medal.

"Wellness Warriors on the Run" is a collaborative project with Bucks New University's Community Engagement Team, who secured funding from Sport England. These funds, held and managed by Bucks New University, were specifically allocated for runners' t-shirts, race entry fees, and head torches for winter sessions. While these funds are not reflected in the charity's direct accounts, we maintain transparent communication with Bucks New University and can provide their financial records related to this project if the Commission deems it necessary. We are committed to adhering to best practice in financial reporting and welcome guidance on how to best represent collaborative funding arrangements in future reports.

#### Brothers in Arms:

This men's group was established to create a supportive environment where men can connect and improve their well-being. Recognising the potential reluctance of men to engage with traditional mental health services, the group is marketed as a fitness and social club, using exercise as a catalyst for increased sociability and openness.

The first meeting was held in the week preceding Christmas 2024, a period often associated with heightened emotional challenges. Weekly 1.5-hour sessions are held at a local village hall, which was secured free of charge for an initial three-month period. Fundraising and sponsorship efforts are underway to cover future hall rental costs. Initial interest from local businesses, such as builders' merchants, in providing sponsorship has been encouraging.

Mirroring the successful model of "Wellness Warriors," a committee will be established within "Brothers in Arms" to ensure the club's activities are tailored to the specific needs and interests of its members, fostering a sense of ownership. The Phoenix Lifestyle Foundation trustees will retain overall strategic control.

The intended outcomes of "Brothers in Arms" include: peer support among members, a safe and non-stigmatising space for men to connect, improvements in physical and mental health, engagement in community projects, and a welcoming atmosphere where participants feel they belong. In line with our governing document, leaders within the group will have lived experience of mental health challenges, although they may not be professionally qualified counsellors. The group's focus is on support and connection, and while we can provide signposting to professional counselling services, we do not offer direct counselling within this project.

#### Achievements and Performance

##### Wellness Warriors on the Run:

The "Wellness Warriors on the Run" project has significantly exceeded initial expectations in its first year. Achieving affiliation with England Athletics and establishing

a well-functioning committee with qualified running leaders and safeguarding officers demonstrates a strong commitment to quality and safety.

A particularly impactful success story is that of a participant in the first wave who achieved sobriety on his first day with the group after 27 years of addiction and remains sober at the time of writing (1.5 years later). The program has consistently maintained an average engagement rate of 80% of enrolled runners completing the nine-week program.

Feedback from participants has been overwhelmingly positive, with many reporting weight loss, lower blood pressure, and, crucially, significant improvements in their mental well-being and overall happiness. Participants have also reported increased sober days and a greater sense of hope for long-term recovery.

The project has fostered a strong sense of community and belonging, with participants actively engaging in a supportive WhatsApp group, organising social activities, and beginning to participate in local community events.

#### Brothers in Arms:

As this project was launched in the final week of the reporting period, there are no significant performance outcomes to report at this time. However, the initial response and engagement have been encouraging, indicating a potential for positive impact in the future.

Overall, despite being a relatively new and small charity, the Phoenix Lifestyle Foundation has made significant progress in achieving its objectives and has begun to create a positive impact within the community. The successful launch and positive outcomes of the "Wellness Warriors on the Run" project provide a solid foundation for future growth and development.

#### Financial Review

At the end of the reporting period, the charity held a balance of £906 in its bank account. This represents the unrestricted funds available to support the ongoing activities and future development of the charity. As a small organisation, we are committed to prudent financial management and are actively pursuing additional funding opportunities to ensure the sustainability and expansion of our projects. All expenditure during this period was directly related to the establishment and delivery of the two launched projects.

#### Structure, Governance, and Management

The Phoenix Lifestyle Foundation is a Charitable Incorporated Organisation (CIO) governed by its constitution. Our charitable objects, as registered with the Charity Commission, are to relieve the needs of individuals experiencing mental health

challenges and those recovering from drug and alcohol addiction by providing facilities for training, mentoring, and group exercise designed to improve their conditions of life and promote and protect their physical and mental health.

The trustees are responsible for the overall governance, strategic direction, and legal compliance of the charity. The CEO is responsible for the day-to-day management and operational delivery of the charity's activities, currently including the direct delivery of projects and sessions.

During this reporting period, the trustees held formal meetings three times and conducted bi-weekly informal check-in meetings. As the charity grows, the intention is to increase the frequency of formal board meetings to monthly, while maintaining weekly check-ins.

The charity plans to welcome new trustees to the board in December 2024. The appointment process involves individuals registering their interest with the CEO or existing trustees. Potential candidates are then discussed at a subsequent board meeting, and appointments are made by a majority vote of the current trustees.

The trustees acknowledge that the past year has presented some operational challenges, particularly regarding administrative processes and trustee capacity. The departure of a trustee residing overseas, who remained a bank account signatory, temporarily restricted access to the charity's funds. Additionally, the appointment of a trustee to handle administrative tasks did not yield the anticipated outcomes due to unforeseen health issues. These challenges regrettably contributed to the late submission of this report, the lack of a gift aid scheme, and the absence of a website.

The trustees offer their unreserved apologies to the Charity Commission for the delayed submission and acknowledge the importance of timely reporting and robust administrative systems. Lessons have been learned from these experiences, and proactive steps are being taken, including the recruitment of new trustees and the implementation of clearer administrative responsibilities, to prevent recurrence and ensure more efficient operations moving forward.

#### Declaration

The trustees confirm that they have approved this report and are satisfied that it provides a fair and accurate representation of the Phoenix Lifestyle Foundation's activities and financial position during the reporting period.

Charmain Clayton (Chair of Trustees) *Charmain Clayton*

Hannah Williams (Trustee) *Hannah Williams*

Lewis Baker (Trustee/CEO) *Lewis Baker*

Date: 01/05/2025

**PHOENIX LIFESTYLE FOUNDATION**

England & Wales - Charity number 1186727

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# Accounts

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Duplicate Statement of Account

Account Name	Sortcode	Account Number	Sheet Number
Phoenix Lifestyle Foundation	40-24-17	22763648	040

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21APR23	BALANCE BROUGHT FORWARD			948.48
12MAY23	DR TOTAL CHARGES TO 20APR2023	5.00		943.48
17MAY23	CR EASY FUNDRAISING		18.47	961.95
21MAY23	BALANCE CARRIED FORWARD			961.95

Duplicate Statement of Account

Account Name	Sortcode	Account Number	Sheet Number
Phoenix Lifestyle Foundation	40-24-17	22763648	039

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21MAR23	BALANCE BROUGHT FORWARD			953.48
11APR23	DR TOTAL CHARGES TO 20MAR2023	5.00		948.48
21APR23	BALANCE CARRIED FORWARD			948.48

Duplicate Statement of Account

Account Name	Sortcode	Account Number	Sheet Number
Phoenix Lifestyle Foundation	40-24-17	22763648	041

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21MAY23	BALANCE BROUGHT FORWARD			961.95
11JUN23	DR TOTAL CHARGES TO 20MAY2023	5.00		956.95
21JUN23	BALANCE CARRIED FORWARD			956.95

Please tick one Signing Rule option:

PHOENIX LIFE\*BCA

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Duplicate Statement of Account

Account Name  
Phoenix Lifestyle Foundation

Sortcode  
40-24-17

Account Number  
22763648

Sheet Number  
042

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21JUN23	BALANCE BROUGHT FORWARD			
12JUL23	DR TOTAL CHARGES TO 20JUN2023			956.95
21JUL23	BALANCE CARRIED FORWARD	5.00		951.95
				951.95

Please tick one Signing Rule option:

Historic statements - 40241722763648 BUSINESS A/C PHOENIX LIFE\*BCA

Page

Duplicate Statement of Account

Account Name	Sortcode	Account Number	Sheet Number
Phoenix Lifestyle Foundation	40-24-17	22763648	043

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21JUL23	BALANCE BROUGHT FORWARD			951.95
11AUG23	DR TOTAL CHARGES			
	TO 20JUL2023	5.00		946.95
21AUG23	BALANCE CARRIED FORWARD			946.95

18/05/2024

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Duplicate Statement of Account

Account Name	Sortcode	Account Number	Sheet Number
Phoenix Lifestyle Foundation	40-24-17	22763648	044

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21AUG23	BALANCE BROUGHT FORWARD			946.95
11SEP23	DR TOTAL CHARGES TO 20AUG2023	5.00		941.95
21SEP23	BALANCE CARRIED FORWARD			941.95

18/05/2024

Historic statements - 40241722763648 BUSINESS A/C PHOENIX LIFE\*BCA

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Duplicate Statement of Account

Account Name  
Phoenix Lifestyle Foundation

Sortcode  
40-24-17

Account Number  
22763648

Sheet Number  
045

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21SEP23	BALANCE BROUGHT FORWARD			941.95
12OCT23	DR TOTAL CHARGES TO 20SEP2023			
21OCT23	BALANCE CARRIED FORWARD	5.00		936.95
				936.95

18/05/2024

Please tick one of

Historic statements - 40241722763648 BUSINESS A/C PHOENIX LIFE\*BCA

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Historic statements - 40241722763648 BUSINESS A/C PHOENIX LIFE\*BCA

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Duplicate Statement of Account

Account Name	Sortcode	Account Number	Sheet Number
Phoenix Lifestyle Foundation	40-24-17	22763648	046

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21OCT23	BALANCE BROUGHT FORWARD			
11NOV23	DR TOTAL CHARGES TO 20OCT2023			936.95
21NOV23	BALANCE CARRIED FORWARD	5.00		931.95
				931.95

18/05/2024

Please tick one Signing Rule option:

Historic statements - 40241722763648 BUSINESS A/C PHOENIX LIFE\*BCA

Duplicate Statement of Account

Account Name	Sortcode	Account Number	Sheet Number
Phoenix Lifestyle Foundation	40-24-17	22763648	047

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21NOV23	BALANCE BROUGHT FORWARD			931.95
12DEC23 DR	TOTAL CHARGES TO 20NOV2023	5.00		926.95
21DEC23	BALANCE CARRIED FORWARD			926.95

Please tick one Signing Rule option:

...ric statements - 40241722763648 BUSINESS A/C PHOENIX LIFE\*BCA

Duplicate Statement of Account

Account Name  
Phoenix Lifestyle Foundation

Sortcode  
40-24-17

Account Number  
22763648

Sheet Number  
048

Charitable Bank Account details

Payment Type and Details	Paid Out	In	Balance
EC23 BALANCE BROUGHT FORWARD			926.95
JAN24 DR TOTAL CHARGES TO 20DEC2023	5.00		921.95
JAN24 BALANCE CARRIED FORWARD			921.95

Signatory alone

electing "any one signatory alone", it's Your responsibility to check that Your constitution and  
ce that applies to You (including where applicable Charities Commission guidance which  
authorisation) permits a single signing authority. We will not undertake a review of Your  
uments or any guidance that applies.

Historic statements - 40241722763648 BUSINESS A/C PHOENIX LIFE\*BCA

Duplicate Statement of Account

Account Name	Sortcode	Account Number	Sheet Number
Phoenix Lifestyle Foundation	40-24-17	22763648	049

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21JAN24	BALANCE BROUGHT FORWARD			
11FEB24	DR TOTAL CHARGES TO 20JAN2024			921.95
21FEB24	BALANCE CARRIED FORWARD	5.00		916.95
				916.95

Tick one Signing Rule option:

1: Any one signatory **alone**

"any one signatory **alone**", it's Your responsibility to check that Your constitution and Charitable Charities Commission guidance which

Historic statements - 40241722763648 BUSINESS A/C PHOENIX LIFE\*BCA

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Duplicate Statement of Account

Account Name Phoenix Lifestyle Foundation	Sortcode 40-24-17	Account Number 22763648	Sheet Number 050
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Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21FEB24	BALANCE BROUGHT FORWARD			
13MAR24	DR TOTAL CHARGES TO 20FEB2024			916.95
21MAR24	BALANCE CARRIED FORWARD	5.00		911.95
				911.95

Duplicate Statement of Account

Account Name	Sortcode	Account Number	Sheet Number
Phoenix Lifestyle Foundation	40-24-17	22763648	051

Your Charitable Bank Account details

Date	Payment Type and Details	Paid Out	In	Balance
21MAR24	BALANCE BROUGHT FORWARD			911.95
11APR24	DR TOTAL CHARGES TO 20MAR2024	5.00		906.95
21APR24	BALANCE CARRIED FORWARD			906.95



**PHOENIX LIFESTYLE FOUNDATION**

England & Wales - Charity number 1186727

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# Accounts

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Phoenix Lifestyle Foundation - 118727

SORP Ref	Coment
1.17	Providers of physical training to assist in recovery of those adults affected by alcohol or drug addiction Platform for group sessions of guided fitness activities providing exercising within a safe environment in a non judgemental gathering, promoting health and wellbeing and a space to work with people of similar experience
1.17 and 1.19	
1.18	Trustees confirm regard to guidance on public benefit Since registering as a charity in 2019 - Covid hugely impacted the start up phase. Minimal activity and fund raising ensued over following 2 years. Between 2021 and 2022 the charity has been somewhat dormant in fund raising and delivery sessions, though has provided a small number of managed sessions that have brought affected participants into a valued safe environment. Activities have included a group walk around the Isle of Wight and a team Dragon Boat event and countryside litter collection ramble. Each of which raising awareness and benefits of activity, not just in a gym based environment.
1.2	
	2021 to 2022 financially stagnant, but stable with charitable donations and a total amount in reserve of £992 . No expenditure beyond £5 bank charges, as no cost incurred in the minimal events undertaken.
1.21	Uncertainties as continuing as a going concern, none, other than the need for momentum, time and attention to move forward.
1.23	
	Only source of fund raising has been a volunteer birthday donation to kick start the income destined to pay for equipment and any venue fees
1.47	Risks facing the charity are momentum, time and activity and visibility and need for affiliation with organisations who can direct candidates to the services on offer
1.46	
Charity Name	Phoenix Lifestyle Foundation
Charity Number	11876727
Principal Address	287 Amersham Road, Hazelmere, High Wycombe HP15 7QA
Trustee Name	Howard St. John Smith - Trustee
Trustee Name	Suzy Uprichard - Trustee
Trustee Name	Karl Hillcoat-Williams - Chair
Signed on behalf of Trustees	Karl Hillcoat- Williams - Chair
Dated	25/11/2022

Signature



**PHOENIX LIFESTYLE FOUNDATION**

England & Wales - Charity number 1186727

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# Accounts

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Charities Commission for England and Wales

Trustees Annual Report for the Period: 04/12/19 Period      End Date:      08/02/21

Charity Name              Phoenix Lifestyle Foundation

Charity Number          1186727

**Objectives and Activities**

Para1.17

Purpose to relieve the needs of those with mental health issues and those recovering from drug or alcohol addiction, by providing physical training for mental health and wellbeing.

Para1.17 and 1.19

Main activities include group exercise, mentoring and physical activities in a safe and supportive environment to share experiences without prejudice to dissolve stigma, promoting and protecting both physical and mental health.

Para 1.18

We the trustees confirm our knowledge and understanding and compliance relating to the guidance issued by the Charity Commission on public benefit.

- Howard St. John Smith
- Karl Hillcoat-Williams
- Suzy Uprichard

**Achievement and Performance**

Para 1.20

The Charity established 4<sup>th</sup> December 2019 and was immediately impacted by Covid, preventing the active group participation of the people attending the courses. Since then, we have not operated whilst we needed to comply with UK Covid restrictions and controls.

Financial Review

Para 1.21

Due to covid, the opportunity to deliver group training sessions did not start as intended.

Para 1.22

Reserves are negligible due to covid; however, donations received in the period are currently held on reserve only as we have not had any expenditure. £800 is our sum of received funds.

No funds materially in deficit.

Para 1.23

No uncertainties about the charity not being able to continue as a going concern.

## **Additional information**

Para 1.47

Principal sources of funds have been through charitable donations celebrating our CEO's birthday.

To create presence and market the charity, who we support and what we do, we raised awareness and all donations received provided our kick-starter to the charitable efforts planned moving forward.

Para1.46

Investment policy and objectives regarding social investment policy: Not applicable

Para 1.46

Only risk facing the charity has been covid restrictions in force.

Structure Governance and Management

Para 1.25

Charity submission document

Para 1.25

Charity is CIO Foundation

Para 1.25

Trustee method of selection, election to post – this was facilitated during pre-charity acceptance during scheduled meetings, wherein the participants evaluated the strengths and contributions that would best serve the objective of the Phoenix Foundation and the specific clientele

## **Reference and Administrative details**

Charity Name.

Phoenix Lifestyle Foundation (CIO)

Registered Charity Number 1186727

Principle Address

287 Amersham Road,

Hazlemere ,

High Wycombe,

HP15 7QA

Names of Trustees: Appointed 3/11/2019

- Howard St. John Smith
- Karl Hillcoat-Williams
- Suzy Uprichard

No corporate trustees

No property belonging to the charity

No funds held as custodian trustees on behalf of others.

Declarations

Signature(s)  

Full Name Karl Hillcoat-William / Howard St. John Smith

Position Chair / Trustee

Date 1/12/2021