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Joanna Toole Foundation

Annual report 2020-2021

Adrian Toole Chair 30 July 2021

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CIO Incorporation and HMRC

The Joanna Toole Foundation (JTF) was incorporated as a Charitable Incorporated Organisation (CIO) in England and Wales on 18 February 2020 with help from Joanna's ex-employer World Animal Protection and from Solicitors Bates Wells, we are grateful to both. The JTF was registered with HMRC for tax purposes on 18 February 2020 as a Charitable Incorporated Organisation (CIO). Our first reporting year is therefore 18/02/20 to 31/03/21. Following reporting years will be 1st April to 31 March.

Bank Account

We opened a bank account with Charities Aid Foundation Bank (CAF) on 02 June 2020.

Official Launch

The official launch was on Monday 8th June 2020. We had intended this to be a major event in the Palace of Westminster on World Oceans Day, however when the first Covid lockdown was imposed this became untenable and we had to be content with a launch on our website. By that time the winners of the first Joanna Toole Ghost Gear Solutions award had been announced and we were able to secure video clips from representatives of both organisations as well as from Zac Goldsmith, UK Secretary of State for the Environment, all wishing the JTF well.

Our beautiful logos were created for us by World Animal Protection to whom we are grateful for assistance in this and for many other kindnesses.

Objectives

In its constitution, the JTF's objectives are the following:

- a) *to continue the work of Joanna Helen Toole in advancing the welfare of animals, in particular but not exclusively, that of marine fauna;*
- b) *to advance education and training of the public and appropriate professionals in matters pertaining to the anthropogenic threats to the welfare of animals, in particular but not exclusively that of marine fauna;*
- c) *for the public benefit, to promote scientific research into the welfare of animals, in particular but not exclusively, that of marine fauna; and*
- d) *to advance all other such charitable purposes under the laws of England and Wales.*

The JTF's Mission Statement is:

'To continue the global work of campaigner Joanna Toole in advancing the welfare of animals, in particular that of marine fauna. We achieve this through grants for practical action and training, for education on anthropogenic threats, and for scientific research.'

Trustees and Advisors

The board of Trustees have remained unchanged and are Adrian Peter Toole (Chair), Victoria Toole (Treasurer), Claire Bass, Alyx Elliott, and Georgina Groves.

Mark Simmonds was appointed as an initial formal advisor and was later joined by Sigrid Lueber, Sienna Sommers, and Elizabeth Hogan all of whom have expertise in their fields. The trustees are grateful to them for their advice on the applications.

The Trustees have met formally on six occasions during the year in question. Our constitution permits all JTF business to be conducted electronically.

Thanks also to Hattie Ajderian who is giving up her time to be our Independent Financial Examiner for this period.

Grant Policy

At the time of incorporation, it had been envisaged that we would offer three annual 'windows' for grant applications under the criteria stated on our Website and reproduced below. These we term 'standard' grants:

Criteria

Please read our funding criteria carefully before applying for a grant. The Foundation will only consider applications that meet all or some of the following criteria:

- Projects that advance the welfare of animals, in particular but not exclusively, that of marine fauna.
- Projects that advance the education and training of the public and professionals to the anthropogenic threats to the welfare of animals, in particular but not exclusively, that of marine fauna.
- Projects that promote scientific research into the welfare of animals, in particular but not exclusively, that of marine fauna.
- Grants will only be made to registered charities, individuals or groups that make positive contributions in line with the objectives of the Foundation.

Further Information – What We Fund

- We fund projects that promote the protection and improvement of all species of animals.
- We fund projects both in the UK and overseas and there are no geographical restrictions.
- We fund projects that demonstrate innovative educational and training opportunities that counter threats to the welfare of animals and provide solutions.
- We fund projects that carry out applied research that focuses on solving animal welfare problems.

Exclusions – What We Don't Fund

- We will not fund scientific research that causes suffering or harm to animals.
- Research that does not demonstrate an applied approach.
- Work that does not directly or indirectly benefit the welfare of animals.
- Capital costs if they cannot show a tangible outcome that meets our criteria.
- The promotion of any religious ideology.
- The promotion of any political ideology or party.
- Salaries and ongoing revenue costs of running an organisation and/or operating and maintaining facilities.

Length of Projects and Multi-year funding

There is no minimum or maximum time requirement for the projects we fund, but all projects must result in clear tangible outputs that fulfil the objectives. The Joanna Toole Foundation will also fund projects that require multi-year funds. The applicant must be able to clearly demonstrate why these funds are needed over that multi-year period of time. (Please see Grant Application Form). Projects seeking multi-year funding can apply for funds that meet this amount on an every 12 month basis.

Level of Grant Provided

Our aim is for the Foundation to support multiple projects each year. As a result, a typical grant amount provided by the Foundation to any one applicant is between £1000 and £10,000. For exceptional and relevant projects we will consider up to £15,000. If the costs of a project is higher than the Foundation can or is willing to donate, we will consider partial funding if:

- the applicant can demonstrate they will receive match funding.
- the Foundation's donation is a substantial part of the project cost; or
- the Foundation's donation is used for a clearly defined part of the project.

Emergency Funding

The JTF came into existence shortly before the UK went into lockdown to combat the Covid19 virus and most other countries imposed measures that disrupted visits and volunteer placements to animal rescue centres/sanctuaries thus disrupting a major source of income and limiting the human resources available. In addition, the attention of the public was elsewhere and donations dried up. It became clear to the trustees that many such organisations, at home and abroad, were becoming unable to properly look after the animals

in their care and government assistance, sometimes generous for human needs, was mostly lacking for animal welfare. We decided in August 2020 therefore to offer grants for emergency purposes. This program we titled: 'COVID19 EMERGENCY ANIMAL CARE GRANT - 2020'. The timing of this program overlapped with the 1st round of our Standard Grants. More details may be found later in this report.

NB: Although we no longer promote such an opportunity, further appeals still come in from time to time.

Income

Details of our income and expenditure can be found in the financial statement that accompanies this annual report. In summary, our income has derived from:

- *Joanna's estate through her next-of-kin Adrian Toole (our Chair)*
- *Interim compensation from Boeing through Adrian and Vicky Toole*
- *A substantial anonymous donation*
- *A donation from Vicky Toole*
- *A legacy from Joanna's Grandmother Roisin Toole*
- *A number of significant donations from friends and family*
- *A collection amongst Joanna's colleagues at FAO*
- *Sales of graphics at Joanna's memorial*
- *A steady stream of on-line donations (I have thanked the five who make regular DD payments)*
- *Just Giving campaign by friends and family*

All donors whose identity was been disclosed have been thanked by AT. With significant additional income expected through family members, the Trustees will develop an investment strategy.

Expenditure

Expenses incurred in registering the Foundation are detailed in the financial report. There were no paid staff at any time during the year. Trustees' expenses claims relating to the year have yet to be assessed. Expenditure therefore has been almost entirely on grants. Percentage of total outgoings spent on administration was 0.3%.

There have been three rounds of grants all specifically announced on our Website and SM outlets: One round of emergency assistance for sanctuaries and shelters that suffered financially on account of Covid lock-down measures, and two rounds of 'Standard' grants intended for long-term animal welfare projects. The second of the Standard rounds also addressed three speculative applications for emergency funding. Drawing also on the expertise of our advisors, the trustees decided to award grants to applicants as listed in the following sections but did reject a substantial number of applications. The JTF pays all UK bank charges on our grants. Total amount awarded over the year was £46340 as follows:

Emergency Grant Round

This was launched in August 2020 and paid out grants of up to £3000 to 10 organisations that were struggling to look after the animals in their care. Total of Emergency help grants awarded: £29000. These are the grantees:

- *BDMLR, UK*
- *Rancho Universo Cozumel Sanctuary, Mexico*
- *Flicker Foundation, UK*
- *Blue Rose Ranch, USA*
- *Colobus Conservation, Kenya **
- *Prickles and Paws Hedgehog Rescue, Cornwall*
- *Kilimanjaro Animal C.R.E.W. , Tanzania*
- *Chimpanzee Sanctuary and Wildlife Conservation Trust, Uganda*
- *Vervet Monkey Foundation (VMF), South Africa **
- *Lilongwe Wildlife Centre (LWC), Malawi **

* 3 grants routed through Pan African Sanctuary Alliance (PASA)

Standard Grant Round 1

This round closed to applicants at the end of September 2020. Total grants awarded in standard grant round one: £17340.

We received 13 applications of which the following seven were funded:

- *Advocates for Animals: The UK's only animal welfare lawyers; much needed when the public's attention is elsewhere.*
- *Beach Guardian: Beach-cleaning in Cornwall where our grant went towards the construction of an art work in Padstow representing a whale entrapped in plastic debris.*
- *ELI – Scientific: French Scientific expedition to discover more about the little-studied Humpback whales in Nicaraguan waters. ELI-S has a wider brief than pure science, working on five of the UN sustainability goals. Joanna was doing a Masters in delivery of these goals when she died and was awarded her degree posthumously.*
- *Faunalytics: a U.S. nonprofit committed to advancing animal protection through research and education. The mission is to empower advocates with research and strategies that maximize their effectiveness to reduce animal suffering. Our grant is to fund a data series 'Marine Animal Fundamentals'.*
- *KARUMBE: Based in Uruguay, the funded project seeks to prevent plastic debris from the fishing sector from reaching the Patagonian sea. Marine turtles are thought to be especially at risk. The Joanna Toole Foundation contribution will go towards an education program.*
- *Sage Max. on behalf of Richman Law Group in New York for their project Aquatic Animal Welfare Investigation and Case Development. Sage Max is a recent graduate in a fellowship position with Richman Law Group, where fellows develop false-advertising litigation against industrial animal agribusinesses. As food companies increasingly mislead consumers about the industry's impacts on public health, the environment, animals, and workers—fellows work to expose the harmful reality of commercial animal agriculture and ensure that companies live up to their marketing representations.*
- *Secret World Wildlife Rescue who are extending their wildlife animal hospital in Somerset, England.*

Standard Grant Round 2

This round was closed to applications on 12 March. We attracted 16 applications but also three speculative applications for emergency funding that we decided we should not ignore. This was a greater number than in our first round so we were getting better known. At year-end therefore the Trustees were busy processing these. *NB: ultimately the total of these grants awarded was £50000.*

Future Grant Opportunities

Our human resources have been stretched at times and to maintain three rounds of standard grants per year now looks over-ambitious, not least because the time needed to process applications and pay grants has proved longer than anticipated, such that with three rounds a year, the processes would overlap. Besides which, we cannot rule out responding to further appeals for emergency assistance. Accordingly, we have not set any date for notifying a third round and will decide on this later in the current year.

Our finances are in good shape and will continue to be so because in the medium term we are anticipating major donations, the amounts of which will be a factor in planning.

Reserves Policy

The trustees agreed at the 2021 AGM (the 1st AGM) a reserves policy as follows:

'The Trustees will maintain in bank accounts sufficient in reserves to meet the financial commitments already entered into for the six months ahead.'

Website

Our website was created by the Chair's nephew Jerome Toole, with support from Wholegrain Digital to both of whom we are very grateful. We first went live in early 2020 and with fantastic efforts by many people, were ready with the official public launch on 8th June, World Oceans Day.

Trustees were then trained by Jerome to edit the website for day-to-day updates; he is still involved.

Social Media Outlets

JTF has a Twitter account @JoannaTooleFdn which is run by the Trustees.

Newsletters

The JTF does not have a formal membership structure so the Chair has circulated a series of newsletters starting in January 2020 to a GDPR-compliant list of subscribers. Up till end March '21, there were five distributed editions and all are on our website. They are written by the Chair as a personal contribution and cover more than just JTF achievements.

Press Coverage

Media coverage has inevitably focussed on Joanna, her work, and the negligence that caused her death but since the founding of the JTF, the Chair has endeavoured to bring the work of the Foundation into as many interviews and press releases as possible.

Press releases by our partners featuring news of the several awards have all mentioned the Foundation.

Awards by Other Organisations

The JTF has been involved with the following, all of which involve the Global Ghost Gear Initiative (GGGI), an international body that our Trustee Claire Bass and Joanna initiated.

RSPCA

Although this occurred before our incorporation, the RSPCA gave a posthumous 'Honours' award to Joanna that her father Adrian collected at a national ceremony.

Internship

The Joanna Toole Internship provides a one-of-a-kind opportunity for an early-career woman interested in pursuing a profession addressing marine litter, ocean and seafood sustainability or abandoned, lost, or discarded fishing gear. The internship is hosted by Ocean Conservancy, Ocean Care, the Joanna Toole Foundation and the Center for Coastal Studies (CCS). The JTF has not contributed financially to the award. In 2020, the partners selected Jenna Schwerzmann, a recent graduate of Stonybrook University's marine conservation policy program, as its first Joanna Toole Intern. The internship consisted of two components: an office-based component with the GGGI team focused on international policy and corporate sustainability as it relates to ghost gear, and a field-component with the CCS laboratory in Provincetown, Massachusetts.

With the COVID-19 pandemic shutting down “normal” life when Jenna started, the plan was pivoted and the GGGI office-based portion of Jenna’s experience to a virtual position. Luckily, Jenna proved flexible and resilient as everyone navigated a new landscape working from home and she was able to complete the second portion of her internship with CCS in-person in Provincetown.

It is intended that the The Joanna Toole Internship will be a perennial opportunity and Ocean Conservancy are to recruit another intern later in 2021; the Trustees thank them for this.

Solutions Award

The Joanna Toole Annual Ghost Gear Solutions Award is given to the most deserving projects that submitted compelling strategies to tackle abandoned, lost and discarded fishing gear, also known as ghost gear. The award is made possible by support from World Animal Protection (WAP), the GGGI and Ocean Conservancy. It continues the work started by Claire, Joanna, and the team at WAP.

Joanna was a devoted animal lover, who dedicated her professional life to this work. This yearly award is a key component of the many initiatives that we plan to keep her legacy and mission alive. Jo is our guide and inspiration in this work and the Trustees thank World Animal Protection, Ocean Conservancy and the GGGI for their contribution to the award.

Adrian and Claire are pleased to be part of the 1st stage of the judging process and final decisions are taken by an Expert Advisory Council convened by GGGI.

2019

The 2019 round produced two winners for projects aiming to rid the oceans of ghost fishing gear, firstly the UK registered charity The International Pole and Line Foundation (IPNLF). IPNLF are working in collaboration with the Olive Ridley Project to implement a pilot project in the Maldives, with the aim of motivating small-scale tuna fishers to remove ghost fishing nets from their seas.

The second winner is the Stand Out For Environment Restoration (SOFER) Initiative. Based in Nigeria, SOFER raises environmental awareness by working with young people, providing practical ways to change behaviours for the better. SOFER have received a grant for their ‘Fishing Net Gains Nigeria’ Project.

2020

The 2020 award was augmented, as was the 2019, with a donation from an anonymous donor to achieve a combined prize of \$60,000 and again there were two winners; the public announcement of the 2020 round winners was delayed for contractual reasons beyond our year-end.

After an impressive round of submissions, the first awardee was Blue Ocean Gear, a US-based organisation, focused on tackling the issue of ghost gear by preventing gear loss using their Smart Buoy technology. Their project focuses on reducing ghost gear and its detrimental impact on sea life in the marine environment near St. Paul Island, Alaska.

The second awardee is a project submitted by the Zoological Society of London (ZSL) to assess the feasibility of establishing the first ever ghost net collection and recycling system on the River Ganges, India, to mitigate the impact of discarded fishing gear on threatened wildlife, particularly the Ganges river dolphin.

Two very different projects therefore illustrating the pernicious, global nature of the Ghost Gear plague.

The Future

The 2021 round will be run as before but in 2022 the Joanna Toole Foundation will be managing and funding the solutions award on its own. The trustees thank WAP and GGGI for their work.

GloLitter

The GloLitter Project (Global Litter Partnerships - GLP) is a project between the Government of Norway and UN agencies IMO and FAO aiming to reduce marine litter. GLP is funded for the initial three years by Norway and will support developing countries, including Small Islands Developing States (SIDS) and Least Developed Countries (LDCs), in identifying opportunities for the prevention and reduction of marine litter. The Joanna Toole GloLitter Partnerships Award, run by GGGI, is open to all organisations and focuses on:

- *Reducing the use of plastic in capture fisheries, aquaculture, fish processing/marketing;*
- *Collecting plastic from capture fisheries, aquaculture, and fish processing/marketing operations for recycling;*
- *Fishing gear loss prevention;*
- *Innovative fishing gear design in terms of reduced environmental impact;*
- *Fisheries plastic litter data gathering; and/or Implementation of the FAO Voluntary Guidelines for the Marking of Fishing Gear (a major professional achievement of Joanna's) and the GGGI Best Practice Framework for the Management of Fishing Gear.*

Applicants must be women-led organizations such as non-profits, associations, startups, or similar registered entities. Only one proposal per organization will be accepted.

The geographical scope of the award will be global, however priority will be given to candidates working in the countries that have signed up to participate in the GLP.

The award is in the planning stage at our year-end and will open to applicants in June 2021.

In Conclusion

The Trustees thank all who have helped launch, run, and publicise the JTF in this our first year as well as the other organisations mentioned. We are all pledged to do our best to keep the memory and the work of Jo alive and we are proud that our first full year has, despite the challenges, succeeded in our mission to safeguard the welfare of so many individual animals of so many species.

Thanks also to our Grantees who are of course the ones working hard putting our money to such good use.



Adrian Toole (Chair)



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name	No (if any)
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Receipts and payments accounts

CC16a

For the period from	Period start date 18th February 2020	To	Period end date 31st March 2021
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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					
Initial Deposit (AT)	1,000	-	-	1,000	-
Donations via CAF	2,021	-	-	2,021	-
Donations from colleague	410	-	-	410	-
Oak foundation donation	19,250	-	-	19,250	-
Donation via CAF	10	-	-	10	-
Donation via CAF	10	-	-	10	-
Donation via CAF	10	-	-	10	-
Donation via CAF	10	-	-	10	-
Donation	49	-	-	49	-
Return Grant Rancho Coz CAF	2,005	-	-	2,005	-
Return Grant Kili TW	3,011	-	-	3,011	-
Donation	96	-	-	96	-
Return Grant Kili CAF	3,000	-	-	3,000	-
Return Grant Sage TW	5,018	-	-	5,018	-
Donation	19	-	-	19	-
Donation (Memorial Guests)	146	-	-	146	-
Return Grant Sage TW	5,018	-	-	5,018	-
Donation	100	-	-	100	-
Donation	29	-	-	29	-
Donation	29	-	-	29	-
Donation	23	-	-	23	-
Donation	43	-	-	43	-
Donation VT	10,000	-	-	10,000	-
Donation AT	20,000	-	-	20,000	-
Interest	1	-	-	1	-
Donation AT	50,000	-	-	50,000	-
Donation VT	8,583	-	-	8,583	-
Interest	2	-	-	2	-
Donation AT	10,000	-	-	10,000	-
Donation AT	6,400	-	-	6,400	-
Interest	2	-	-	2	-
Interest	2	-	-	2	-
Sub total (Gross income for AR)	146,297	-	-	146,297	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	146,297	-	-	146,297	-
A3 Payments					
Bank Account Fee	5	-	-	5	-
Transfer fee	6	-	-	6	-
Bank Account Fee	5	-	-	5	-
Emerg Grant BDMLR	3,000	-	-	3,000	-
Bank Account Fee	5	-	-	5	-
Emerg Grant Prickles and Paws	3,000	-	-	3,000	-
Emerg Grant Flicka Foundation	3,000	-	-	3,000	-
Emerg Grant BRR	3,000	-	-	3,000	-
Transfer fee	20	-	-	20	-
Emerg Grant PASA	9,000	-	-	9,000	-
Transfer fee	20	-	-	20	-
Emerg Grant Chimp	3,000	-	-	3,000	-
Transfer fee	20	-	-	20	-

Bank Account Fee	5	-	-	5	-
Autumn Grant Rancho Coz	2,000	-	-	2,000	-
Transfer fee	20	-	-	20	-
Autumn Grant Kilimanjaro	3,000	-	-	3,000	-
Transfer fee	20	-	-	20	-
Bank Account Fee	5	-	-	5	-
Autumn Grant Rancho Coz TW	2,014	-	-	2,014	-
Autumn Grant Beach Guard	2,400	-	-	2,400	-
Autumn Grant Secret World WR	1,000	-	-	1,000	-
Autumn Grant Eli TW	3,653	-	-	3,653	-
Autumn Grant Faunalytics TW	1,506	-	-	1,506	-
Autumn Grant Kilimanjaro TW	3,011	-	-	3,011	-
Autumn Grant Advocates	2,000	-	-	2,000	-
Autumn Grant Kilimanjaro TW 2	3,014	-	-	3,014	-
Bank Account Fee	5	-	-	5	-
Autumn Grant Sage TW	5,018	-	-	5,018	-
Bank Account Fee	8	-	-	8	-
Autumn Grant Sage TW	5,018	-	-	5,018	-
Autumn Grant Sage (Well Fed World) TW	5,018	-	-	5,018	-
Bank Account Fee	8	-	-	8	-
Bank Account Fee	8	-	-	8	-
Autumn Grant Sage KARUMBE CAF	1,800	-	-	1,800	-
Transfer fee	25	-	-	25	-
Bank Account Fee	8	-	-	8	-
Sub total	64,645	-	-	64,645	-

A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-

Total payments	64,645	-	-	64,645	-
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Net of receipts/(payments)	81,651	-	-	81,651	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	81,651	-	-	81,651	-

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Net of receipts/payments	81,651	-	-
		-	-	-
		-	-	-
	Total cash funds	81,651	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

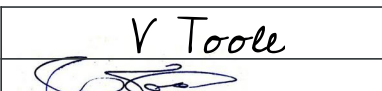
	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	Victoria Toole	27/05/2021
	Adrian Toole	04/06/21

74 Carter Avenue
Exmouth EX8 3EF

Independent examiner's report to the trustees of the Joanna Toole Foundation Trust

I report to the trustees on my examination of the accounts of the Joanna Toole Foundation Trust (the Trust) for the year ended 31 March 2021.

Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act'). I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed:



Name: Harriet J Ajderian

Address: 74 Carter Avenue, Exmouth EX8 3EF

Date: 3 August 2021