

PALZ UK

England & Wales · Charity number 1190292

Details

Other names	PROFESSIONALS WITH ALZHEIMER'S UNITED KINGDOM, PALZ, PALZ UK
Status	Registered
Legal form	CIO
Registered	2020-07-08
Register	View on the Charity Commission register

Contact

Address	Yew Tree Cottage Longnor Shrewsbury SY5 7PP
Phone	07880602383
Email	info@palzglobal.org.uk
Website	www.palzuk.org.uk

Activities

Objects: The object of the CIO is for the public benefit, the relief and assistance of people who are now living with Alzheimer's (or dementia from other causes), by offering a social environment of peer support and mental challenge which will provide self-respect, confidence, mental stimulation and involvement to those who attend and their supporters

Activities: Provides stimulating talks, in a work type environment, for those in the early stages of dementia(from whatever cause) together with their supporters, including opportunities for questions and discussion; arranges group visits to places of interest; creates opportunities for social interaction with like minded people, from challenging and demanding work backgrounds who just happen to have dementia

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** General Charitable Purposes, The Advancement Of Health Or Saving Of Lives, Disability
- **Who:** People With Disabilities, Other Defined Groups

Geography

- Shropshire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£2,914	£2,964	-	-
2024-03-31	£2,924	£2,535	-	-
2023-03-31	£6,718	£2,409	-	-
2022-03-31	£1,315	£1,266	-	-
2021-03-31	£1,570	£198	-	-

Trustees

Name	Role	Appointed
Elizabeth Andree Holdsworth	Chair	2020-07-09
Catherine Olivia Balmforth Slater		2023-07-25
Christine Kendall		2020-07-09
Karen Dawn Breese		2025-06-10

PALZ UK

England & Wales - Charity number 1190292

Accounts

PALZ UK

Accounts

For The Year Ended 31 March 2025

PALZ UK
Reference and Administrative Details

Charity Name	PALZ UK
Charity Number	1190292
Principal Address	Yew Tree Cottage Longnor Shrewsbury SY5 7PP
Trustees	Elizabeth Andree Holdsworth Catherine Olivia Balmforth Slater Christine Kendall Katrina Eleanor Hall
Accountant	Community Accounting Services Ltd 7 Napoleon Drive Shrewsbury SY3 5PH

**Trustees' Report
of PALZ UK
on the Accounts for the Year Ended 31 March 2025**

The trustees present their annual report and financial statements of the charity for the year ended 31 March 2025. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

Structure, Governance and Management

The charity is registered with the Charity Commission and is run in accordance with the Constitution adopted on 8 July 2020 as amended on 18 October 2024.

PALZ UK is led and managed by volunteer trustees. Currently there are 4 but the charity is seeking to recruit more. The PALZ Shropshire branch group is managed by a separate committee of 4 volunteers and assisted by a further 3 volunteers at the meetings. There are no paid staff.

The charity is not part of an umbrella group.

The charity was inspired by, is based on a similar model to, and has an informal affiliation with PALZ Global based in Australia but remains independent.

Trustee selection methods

New trustees are appointed by a resolution passed at a properly convened meeting of the charity trustees and individuals are selected having regard to the skills, knowledge and experience needed for the effective administration of the CIO.

We have a written procedure for the induction of trustees and all trustees are encouraged to attend relevant on-line training courses

The trustees have been provided with access to the Public Benefit Guides produced by the Charity Commission and have regard to that guidance.

Objectives and Activities

For the public benefit, the relief and assistance of people who are now living with Alzheimer's (or dementia from other causes), by offering a social environment of peer support and mental challenge which will provide self-respect, confidence, mental stimulation and involvement to those who attend and their supporters.

We support our community through:

- The provision of meetings which provide the opportunity for discussion and socialising between participants in the early stages of a dementia diagnosis and their supporters in Shropshire. Six of these annual meetings include a talk by a high calibre speaker and, on alternative months, an opportunity to just meet and socialise
- The provision of follow up visits or social activities depending on the preferences of participants as we develop.
- Providing an opportunity for participants and their supporters to re-experience the intellectually stimulating environment they once shared and to make connections and friendships with others in a similar situation.
- Working with a range of local and national organisations to promote awareness of the provision; to identify those that may benefit; and to facilitate referral pathways and learn from each other.
- Seeking opportunities for setting up groups in other areas in order to expand the provision throughout the UK.

The provision is aimed at all people with early dementia. We have an inclusive approach, welcoming all people who wish to attend and who may benefit from the provision.

We do not replicate activities for people with advanced dementia or people who would prefer a health/care/church setting for whom existing excellent services are available.

PALZ UK focuses not on the disease but on the person who had an active, interesting life before being diagnosed with dementia.

PALZ UK is not just for people with dementia - it is a dementia friendly activity that everyone can enjoy.

Contributions made by Volunteers

PALZ UK does not currently have any paid staff and all work is carried out by volunteers. It is estimated that approximately 400 to 500 hours per month are provided by way of:

- Management of the charity
- Organising meetings
- Promoting the charity to potential referrers
- Communicating with and supporting participants and their supporters

**Trustees' Report
of PALZ UK
on the Accounts for the Year Ended 31 March 2025**

Achievements and Performance in the year

We provide hands on support for participants including:

- 6 meetings of the Shropshire PALZ group with a speaker
- 6 social Shropshire PALZ group meetings on alternative months
- Regular contact with participants by phone and email to notify of meetings
- Regular meetings of the Shropshire committee
- Inviting interested parties from the dementia services to attend meetings of the Shropshire PALZ group to see how successful they are
- Identifying charitable trusts to approach for funding and preparing and submitting funding applications
- Receiving donations in recognition of the excellent work done by PALZ UK from participants at meetings and from the funeral of one participant who passed away during the year
- Further raising awareness of PALZ via engagement with dementia services countrywide in areas including Bristol, Chester, Chingford, Warrington and North Yorkshire; meetings with volunteers and service providers throughout Shropshire; adding interested parties to our contact list and regularly updating them on the success of the group; emailing television and radio stations; and distribution of leaflets throughout the country. In each case we promoted the benefit PALZ provides to those with dementia and their supporters
- Continuing to promote contact with and canvass the support of people in Shropshire whose positions could help promote PALZ including welcoming a wide range of speakers
- Attendance at county-wide dementia events and thus further raising awareness
- Continuing to be a recommended service under the Social Subscribing Scheme
- Increasing the number of participants and supporters attending the meetings of the Shropshire group
- Reviewing our trustees' skills set and seeking to identify potential new trustees for the organisation
- Continuing to recruit volunteers to assist with the running of the Shropshire group

The difference we made to the circumstances of its beneficiaries during this period can be summed up in the words of a participant and a supporter.

Participant

Since my diagnosis with Alzheimers 18 months ago I have found it almost impossible to find any group that did not involve jigsaws, crafts, or singing, none of which I was interested in participating in. It was in discussion on this very subject with my consultant when she said that she had heard of PALZ and gave me the contact details.

What a breathe of fresh air. I am considered to be intelligent. I am considered to be interested in furthering my general knowledge. I am considered to be interested in meeting other people who are like-minded.

All those I have spoken to, some of whom have Alzheimers and some of whom are supporters have all seemed to be interested in me as a person rather than an Alzheimers patient.

On arrival, even at my first meeting, I felt warmly welcomed into this group and safe in the knowledge that Alzheimers was fully understood and acknowledged - thank you.

Supporter

Both my husband and I from the very first meeting felt very comfortable being with such lovely folk, because we are all there for the same reason it is easy to talk to each other without feeling the need to give a long explanation. As a carer it is all too easy to begin to speak on behalf of the person you are caring for as their memory fails them. At PALZ it was so refreshing to relax with like-minded people. The format of our meetings is great and we have had excellent speakers on many interesting subjects.

What attracted us to PALZ?

We heard through our solicitor that this group was being set up, at the time my husband's condition was much better than today. It was the type of group which appealed to him, having trained as a Marine Engineer and then as a lecturer in Further Education he was able to meet others with the same interests, many of whom had been in positions of responsibility. It certainly made him feel he was not alone and he enjoyed the companionship.

We are so grateful to PALZ and all of you who have given so much of your time to help those who have this condition we know as Alzheimers

We continue to provide dignity and respect to bright people who just happen to have dementia.

We have continued to receive steady funding throughout the year, sufficient to cover running expenses and provide a fund for on-going expansion.

The support we continued to provide is appreciated by participants and their supporters as shown above.

Financial Review

The charity's financial position is healthy and, as all work is currently carried out by volunteers, overheads remain small.

**Trustees' Report
of PALZ UK
on the Accounts for the Year Ended 31 March 2025**

Reserves Policy

Overheads currently run at a very low level, and we hold more than sufficient cash in our current bank account to cover these for at least the next 6 months. During the year we opened a 95 Day Notice Bank Account to earn interest on funds held for future activities. We will continue to monitor the use of funds and advise trustees at each general meeting whether funds are sufficient for PALZ UK to continue to operate.

Principal source of funds

The principal sources of funding are:

- Local grants
- Individual private and business donors
- Trusts

Risk Review

A detailed risk assessment has been carried out and is formally reviewed regularly and considered informally at each general meeting and updated accordingly.

The most significant risks identified during this period were:

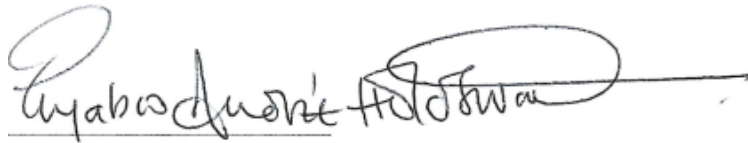
- Failure to set up any further groups (in addition to the Shropshire group) but discussions are taking place with interested parties in a number of different areas
- Potential loss of the key trustee (the Chair) and this is being addressed by an active policy of identifying and seeking to recruit more trustees with the relevant skills to ensure the future of PALZ UK

Declaration

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

Signed on behalf of the charity's trustees

**Elizabeth Andree Holdsworth
Chairman**



Date

14th Jan 2026

**Independent Examiner's Report to the
Management Committee of PALZ UK
on the Accounts for the Year Ended 31 March 2025**

Basis of independent examiner's report

We report on the accounts of PALZ UK for the year ended 31 March 2025.

The Group's officers are responsible for the preparation of the accounts. The Group's officers consider that an audit is not required for this year and that an independent examination is needed.

It is our responsibility to:

- examine the accounts
- to follow the general directions for the conduct of an independent examination
- to state whether particular matters have come to our attention.

Basis of independent examiner's statement

Our examination was carried out in accordance with general directions for an independent examination. An examination includes a review of the accounting records kept by the committee and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as a committee concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently we do not express an audit opinion on the view given by the accounts.

Independent examiner's statement

In connection with our examination, no matter has come to our attention:

1. which gives us reasonable cause to believe that in, any material respect, the requirements
 - to keep appropriate accounting records; and
 - to prepare accounts which accord with the accounting records and comply with applicable financial reporting standardshave not been met; or
2. to which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

**Community Accounting Services Ltd
7 Napoleon Drive
Shrewsbury
SY3 5PH**

Date: 23/01/2026

PALZ UK
Income & Expenditure Accounts
for the Year Ended 31 March 2025

	Unrestricted Funds 2025 £	Restricted Funds 2025 £	Total Funds 2025 £	<i>Total Funds 2024 £</i>
Income				
Donations	2,682	-	2,682	2,887
Other income	232	-	232	37
Total Income	2,914	-	2,914	2,924
Expenditure				
Running costs				
Insurance	202	-	202	196
Accountancy	325	-	325	325
Speakers	65	-	65	50
Printing & stationery	606	-	606	225
Website costs	197	-	197	180
Computer costs	34	-	34	32
Venue hire	1,070	-	1,070	900
Refreshments	287	-	287	361
Travel	91	-	91	-
Sundry	87	-	87	266
Total Expenses	2,964	-	2,964	2,535
Net Incoming Resources Before Transfers	(50)	-	(50)	389
Transfer Between Funds	-	-	-	-
Net Incoming Resources	(50)	-	(50)	389
Fund balance brought forward at 1 April 2024	8,970	-	8,970	8,581
Fund Balance Carried Forward at 31 March 2025	8,920	-	8,920	8,970

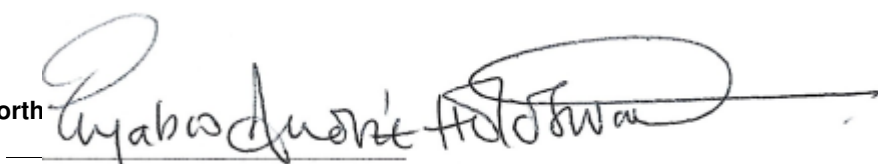
The statement of financial activities includes all gains and losses recognised in the year. All incoming resources and resources expended derive from continuing activities.

PALZ UK
Balance Sheet
as at 31 March 2025

Note	2025	2024
	£	£
Current Assets		
Bank	8,920	8,970
	8,920	8,970
Net Assets	8,920	8,970
 Represented by Funds		
Unrestricted fund	8,920	8,970
Restricted funds	-	-
	8,920	8,970

The Trustees approve the accounts which comprise of the SOFA, the Balance Sheet and the related notes and acknowledge their responsibility for the accounts, including the appropriateness of the applicable financial reporting framework, and for providing Community Accounting Services Ltd with all information and explanations necessary for their compilation.

Elizabeth Andree Holdsworth
 Chairman



Date

14th Jan 2026

PALZ UK

England & Wales - Charity number 1190292

Accounts

Professionals with Alzheimer's United Kingdom

Accounts

For The Year Ended 31 March 2024

**Professionals with Alzheimer's United Kingdom
Reference and Administrative Details**

Charity Name	Professionals with Alzheimer's United Kingdom
Other Names	PALZ UK
Charity Number	1190292
Principal Address	Yew Tree Cottage Longnor Shrewsbury SY5 7PP
Trustees	Elizabeth Andree Holdsworth Catherine Olivia Balmforth Slater Christine Kendall Katrina Eleanor Hall
Accountant	Community Accounting Services Ltd 7 Napoleon Drive Shrewsbury SY3 5PH

**Trustees' Report
of Professional with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2024**

The trustees present their annual report and financial statements of the charity for the year ended 31 March 2024. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

Structure, Governance and Management

The charity is registered with the Charity Commission and is run in accordance with the Constitution adopted on 8 July 2020.

PALZ UK is led and managed by volunteer trustees. Currently there are 4 but the charity is seeking to recruit more. The PALZ Shropshire branch group is managed by a separate committee of 4 volunteers and assisted by a further 3 volunteers at the meetings. There are no paid staff.

The charity is not part of an umbrella group.

The charity was inspired by, is based on a similar model to, and has an informal affiliation with PALZ Global based in Australia but remains independent.

Trustee selection methods

New trustees are appointed by a resolution passed at a properly convened meeting of the charity trustees and individuals are selected having regard to the skills, knowledge and experience needed for the effective administration of the CIO.

We have a written procedure for the induction of trustees and all trustees are encouraged to attend relevant on-line training courses

The trustees have been provided with access to the Public Benefit Guides produced by the Charity Commission and have regard to that guidance.

Objectives and Activities

For the public benefit, the relief and assistance of people who have held challenging and demanding jobs and who are now living with Alzheimer's (or dementia from other causes), with a social environment of peer support and mental challenge which will provide self-respect, confidence, mental stimulation and involvement to those who attend and their supporters.

We support our community through:

- The provision of meetings which provide the opportunity for discussion and socialising between participants in the early stages of a dementia diagnosis and their supporters in Shropshire. Six of these annual meetings include a talk by a high calibre speaker and, on alternative months, an opportunity to just meet and socialise
- The provision of follow up visits or social activities depending on the preferences of participants as we develop.
- Providing an opportunity for participants and their supporters to re-experience the intellectually stimulating environment they once shared and to make connections and friendships with others in a similar situation.
- Working with a range of local and national organisations to promote awareness of the provision; to identify those that may benefit; and to facilitate referral pathways and learn from each other.
- Seeking opportunities for setting up groups in other areas in order to expand the provision throughout the UK.

The provision is aimed at all people with early dementia. We have an inclusive approach, welcoming all people who wish to attend and who may benefit from the provision.

We do not replicate activities for people with advanced dementia or people who would prefer a health/care/church setting for whom existing excellent services are available.

PALZ UK focuses not on the disease but on the person who had an active, interesting life before being diagnosed with dementia.

PALZ UK is not just for people with dementia - it is a dementia friendly activity that everyone can enjoy.

Contributions made by Volunteers

PALZ UK does not currently have any paid staff and all work is carried out by volunteers. It is estimated that approximately 400 to 500 hours per month are provided by way of:

- Management of the charity
- Organising meetings
- Promoting the charity to potential referrers
- Communicating with and supporting participants and their supporters

**Trustees' Report
of Professional with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2024**

Achievements and Performance in the year

We provide hands on support for participants including:

- 6 meetings of the Shropshire PALZ group with a speaker
- 6 social Shropshire PALZ group meetings on alternative months
- Regular contact with participants by phone and email to notify of meetings
- Regular meetings of the Shropshire committee
- Inviting interested parties from the dementia services to attend meetings of the Shropshire PALZ group to see how successful they are
- Identifying charitable trusts to approach for funding and preparing and submitting funding applications
- Receiving donations in recognition of the excellent work done by PALZ UK from participants at meetings and from the funeral of one participant who passed away during the year
- Further raising awareness of PALZ via engagement with dementia services countrywide in areas including Bristol, Chester, Chingford and North Yorkshire; meetings with volunteers and service providers throughout Shropshire; adding interested parties to our contact list and regularly updating them on the success of the group; emailing television and radio stations; having an article published on the Alumni of Liverpool university web site; and distribution of leaflets throughout the country. In each case we promoted the benefit PALZ provides to those with dementia and their supporters
- Continuing to promote contact with and canvass the support of people in Shropshire whose positions could help promote PALZ including welcoming a wide range of speakers
- Attendance at county-wide dementia events and thus further raising awareness
- Continuing to be a recommended service under the Social Subscribing Scheme
- Increasing the number of participants and supporters attending the meetings of the Shropshire group
- Reviewing our trustees' skills set and seeking to identify potential new trustees for the organisation
- Continuing to recruit volunteers to assist with the running of the Shropshire group

The difference we made to the circumstances of its beneficiaries during this period can be summed up in the words of participants and their supporters

My husband has felt so isolated and PALZ has given him back a sense of belonging.

We enjoy the talks so much and the opportunity to socialise in an informal way is great.

We continue to provide dignity and respect to bright people who just happen to have dementia

We have continued to receive steady funding throughout the year, sufficient to cover running expenses and provide a fund for on-going expansion.

The support we continued to provide is appreciated by participants and their supporters as shown above.

Financial Review

The charity's financial position is healthy and, as all work is currently carried out by volunteers, overheads remain small.

Reserves Policy

Overheads currently run at a very low level, and we hold more than sufficient cash in our current bank account to cover these for at least the next 6 months. During the year we opened a 95 Day Notice Bank Account to earn interest on funds held for future activities. We will continue to monitor the use of funds and advise trustees at each general meeting whether funds are sufficient for PALZ UK to continue to operate.

Principal source of funds

The principal sources of funding are:

- Local grants
- Individual private and business donors
- Trusts

**Trustees' Report
of Professional with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2024**

Risk Review

A detailed risk assessment has been carried out and is formally reviewed regularly and considered informally at each general meeting and updated accordingly.

The most significant risks identified during this period were:

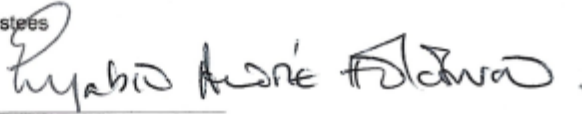
- Failure to set up any further groups (in addition to the Shropshire group) but discussions are taking place with interested parties in a number of different areas
- Potential loss of the key trustee (the Chair) and this is being addressed by an active policy of identifying and seeking to recruit more trustees with the relevant skills to ensure the future of PALZ UK. During this period one new trustee was appointed and 2 retired but the current trustees have continued to identify and are actively seeking to recruit new trustees to complement the skills of the existing ones.

Declaration

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

Signed on behalf of the charity's trustees

**Elizabeth Andree Holdsworth
Chairman**



Date

28th Jan 2025

**Independent Examiner's Report to the
Management Committee of Professionals with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2024**

Basis of independent examiner's report

We report on the accounts of Professionals with Alzheimer's United Kingdom for the year ended 31 March 2024.

The Group's officers are responsible for the preparation of the accounts. The Group's officers consider that an audit is not required for this year and that an independent examination is needed.

It is our responsibility to:

- examine the accounts
- to follow the general directions for the conduct of an independent examination
- to state whether particular matters have come to our attention.

Basis of independent examiner's statement

Our examination was carried out in accordance with general directions for an independent examination. An examination includes a review of the accounting records kept by the committee and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as a committee concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently we do not express an audit opinion on the view given by the accounts.

Independent examiner's statement

In connection with our examination, no matter has come to our attention:

1. which gives us reasonable cause to believe that in, any material respect, the requirements
 - to keep appropriate accounting records; and
 - to prepare accounts which accord with the accounting records and comply with applicable financial reporting standardshave not been met; or
2. to which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Community Accounting Services

**Community Accounting Services Ltd
7 Napoleon Drive
Shrewsbury
SY3 5PH**

Date: 26/01/2025

**Professionals with Alzheimer's United Kingdom
Income & Expenditure Accounts
for the Year Ended 31 March 2024**

	Unrestricted Funds 2024 £	Restricted Funds 2024 £	Total Funds 2024 £	<i>Total Funds 2023 £</i>
Income				
Donations	2,887	-	2,887	6,549
Sale of refreshments	-	-	-	95
Other income	37	-	37	74
Total Income	2,924	-	2,924	6,718
Expenditure				
Running costs				
Insurance	196	-	196	156
Accountancy	325	-	325	370
Speakers	50	-	50	-
Printing & stationery	225	-	225	553
Website costs	180	-	180	270
Computer costs	32	-	32	-
Venue hire	900	-	900	855
Refreshments	361	-	361	187
Sundry	266	-	266	18
Total Expenses	2,535	-	2,535	2,409
Net Incoming Resources Before Transfers	389	-	389	4,309
Transfer Between Funds	-	-	-	-
Net Incoming Resources	389	-	389	4,309
Fund balance brought forward at 1 April 2023	8,581	-	8,581	4,272
Fund Balance Carried Forward at 31 March 2024	8,970	-	8,970	8,581

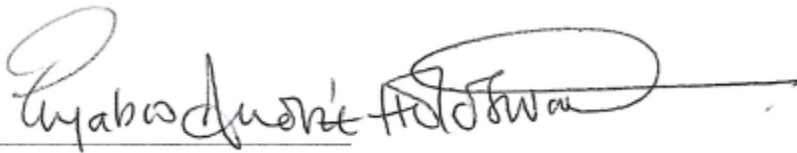
The statement of financial activities includes all gains and losses recognised in the year. All incoming resources and resources expended derive from continuing activities.

**Professionals with Alzheimer's United Kingdom
Balance Sheet
2024**

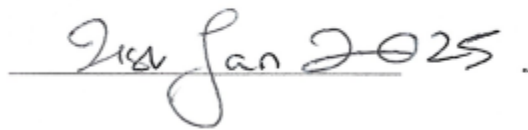
Note	2024		2023	
	£	£	£	£
Current Assets				
Bank	8,970		8,581	
	8,970		8,581	
Net Assets		8,970		8,581
Represented by Funds				
Unrestricted fund		8,970		8,581
Restricted funds		-		-
		8,970		8,581

The Trustees approve the accounts which comprise of the SOFA, the Balance Sheet and the related notes and acknowledge their responsibility for the accounts, including the appropriateness of the applicable financial reporting framework, and for providing Community Accounting Services Ltd with all information and explanations necessary for their compilation.

**Elizabeth Andree Holdsworth
Chairman**



Date



PALZ UK

England & Wales - Charity number 1190292

Accounts

Professionals with Alzheimer's United Kingdom

Accounts

For The Year Ended 31 March 2023

**Professionals with Alzheimer's United Kingdom
Reference and Administrative Details**

Charity Name Professionals with Alzheimer's United Kingdom

Other Names PALZ UK

Charity Number 1190292

Principal Address Yew Tree Cottage
Longnor
Shrewsbury
SY5 7PP

Trustees Elizabeth Andree Holdsworth
Catherine Olivia Balmforth Slater
Philip John Davies
Christine Kendall
Katrina Eleanor Hall

Accountant Community Accounting Services Ltd
7 Napoleon Drive
Shrewsbury
SY3 5PH

**Trustees' Report
of Professional with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2023**

The trustees present their annual report and financial statements of the charity for the year ended 31 March 2023. The financial statements have been prepared in accordance with the Charities Act 1993 and the Statement of Recommended Practice: Accounting and Reporting by Charities published in 2005.

Structure, Governance and Management

The charity is registered with the Charity Commission and is run in accordance with the Constitution adopted on 8 July 2020.

PALZ UK is led and managed by volunteer trustees. Currently there are 5 but the charity is seeking to recruit more. The PALZ Shropshire branch group is managed by a separate committee of 4 volunteers and assisted by a further 3 volunteers at the meetings. There are no paid staff.

The charity is not part of an umbrella group.

The charity was inspired by, is based on a similar model to, and has an informal affiliation with PALZ Global based in Australia but remains independent.

Trustee selection methods

New trustees are appointed by a resolution passed at a properly convened meeting of the charity trustees and individuals are selected having regard to the skills, knowledge and experience needed for the effective administration of the CIO.

We have a written procedure for the induction of trustees and all trustees are encouraged to attend relevant on-line training courses

The trustees have been provided with access to the Public Benefit Guides produced by the Charity Commission and have regard to that guidance.

Objectives and Activities

For the public benefit, the relief and assistance of people who have held challenging and demanding jobs and who are now living with Alzheimer's (or dementia from other causes), with a social environment of peer support and mental challenge which will provide self-respect, confidence, mental stimulation and involvement to those who attend and their supporters.

We support our community through:

- The provision of bi-monthly meetings including a talk by a high calibre speaker and the opportunity for discussion and socialising between participants in the early stages of a dementia diagnosis and their supporters in Shropshire.
- The provision of follow up visits or social activities depending on the preferences of participants as we develop.
- Providing an opportunity for participants and their supporters to re-experience the intellectually stimulating environment they once shared and to make connections and friendships with others in a similar situation.
- Working with a range of local and national organisations to promote awareness of the provision; to identify those that may benefit; and to facilitate referral pathways and learn from each other.
- Seeking opportunities for setting up groups in other areas in order to expand the provision throughout the UK.

Although aimed at professionals and business people with early dementia we have an inclusive approach, welcoming all people who wish to attend and who may benefit from the provision.

We do not replicate activities for people with advanced dementia or people who would prefer a health/care/church setting for whom existing excellent services are available.

PALZ UK focuses not on the disease but on the person who had an active, interesting life before being diagnosed with dementia.

PALZ UK is not just for people with dementia - it is a dementia friendly activity that everyone can enjoy.

Contributions made by Volunteers

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- Promoting the charity to potential referrers
- Communicating with and supporting participants and their supporters

**Trustees' Report
of Professional with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2023**

Achievements and Performance in the year

With the relaxation of Covid restrictions we have been able to return to face to face meetings and more hands on support for participants including:

- 6 face to face meetings with a speaker of the Shropshire PALZ group
- Regular contact with participants by phone and email to provide support and to update on developments
- Continuation of bi-monthly meetings of trustees in person with the option for trustees to attend via Zoom if they were unable to attend in person
- Continuation of regular meetings of the Shropshire committee
- Inviting interested parties for the dementia services to attend meetings of the Shropshire PALZ group to see how successful they are
- Identifying charitable trusts to approach for funding and preparing and submitting funding applications
- Receiving a gift of donations from the family of a participant who sadly died during the year (one of a number received by the organisation since inception) which reflects what the family feels about the benefit of PALZ to their family member with dementia
- Further raising awareness of PALZ via engagement with dementia services countrywide; meetings with Admiral Nurses; adding interested parties to our contact list and regularly updating them on the success of the group; emailing television and radio stations; having an article published in the PENNANT magazine (the journal of the forces pension scheme); and distribution of leaflets throughout the country. In each case we promoted the benefit PALZ provides to those with dementia and their supporters
- Continuing to promote contact with and canvass the support of people in Shropshire whose positions could help promote PALZ including welcoming as speakers both Mrs Selena Graham (the High Sheriff) and Mr Andy Begley (the Chief Executive of Shropshire Council)
- Attendance at county-wide dementia events and thus further raising awareness
- Submitting an application to be included as a service recommended under the Social Subscribing Scheme
- Increasing the number of participants and supporters attending the meetings of the Shropshire group
- Reviewing our trustees' skills set and seeking to identify potential new trustees for the organisation
- Continuing to recruit volunteers to assist with the running of the Shropshire group

The difference we made to the circumstances of its beneficiaries during this period can be summed up in the words of participants and their supporters in the following letters received from attendees of meetings of the Shropshire group:

Well done, a first class meeting. I am sure everyone went home very happy following a most enjoyable morning.

I am a member of u3a and also a Rotary club. Palz is like u3a without the arguments and bickering and like Rotary without the need to be constantly doing good works, and the arguments and bickering!

We have the date of the next meeting in our diaries and look forward to being with you then.'

And

'Thank you for your recent emails and also the video. It was sad to hear of the loss of a new member before we had chance to know him. Sadness is with us at all times with dementia, learning to cope with it is quite an undertaking but being part of a group like PALZ gives us

I do feel our group is special and so different from others but in the fullness of time I hope the news will travel and others will be able to share in what we have.

Geoff and I are so grateful that we were fortunate enough to be part of PALZ from the beginning and our thanks go to you and those good people who support the group.

Looking forward to September.'

We continue to provide dignity and respect to bright people who just happen to have dementia

We have continued to receive steady funding throughout the year, sufficient to cover running expenses and provide a fund for on-going expansion.

The support we continued to provide is appreciated by participants and their supporters as shown as shown in the wording of the letters produced above.

**Trustees' Report
of Professional with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2023**

Financial Review

The charity's financial position is healthy and, as all work is currently carried out by volunteers, overheads remain small.

Reserves Policy

As overheads currently run at a very low level and we hold more than sufficient cash at bank to cover these for at least the next 6 months, we currently hold all funds in the same general account. However, we will monitor the use of funds and advise trustees at each general meeting whether funds are sufficient for PALZ UK to continue to operate. As the charity grows and overheads increase, it is proposed that we will work towards a reserves policy of 6 months to cover the likely cost of staff, activity and other overheads.

Principal source of funds

The principal sources of funding are:

- Local grants
- Individual private and business donors
- Trusts

Risk Review

A detailed risk assessment has been carried out and will be formally reviewed annually, considered informally at each general meeting and updated accordingly. The most significant risks identified during this period were:

- The effect of the pandemic on provision of the service when face to face meetings were not possible. This was addressed by providing the service on-line and providing support by phone and email.
- Potential loss of the key trustee (the Chair) and this is being addressed by an active policy of identifying and seeking to recruit more trustees with the relevant skills to ensure the future of PALZ UK. During this period no new trustees were appointed or retired but the current trustees have continued to identify and recruit new trustees to complement the skills of the existing ones.

Declaration

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

Signed on behalf of the charity's trustees

Elizabeth Andree Holdsworth
Chairman

Date

**Independent Examiner's Report to the
Management Committee of Professionals with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2023**

Basis of independent examiner's report

We report on the accounts of Professionals with Alzheimer's United Kingdom for the year ended 31 March 2023.

The Group's officers are responsible for the preparation of the accounts. The Group's officers consider that an audit is not required for this year and that an independent examination is needed.

It is our responsibility to:

- examine the accounts
- to follow the general directions for the conduct of an independent examination
- to state whether particular matters have come to our attention.

Basis of independent examiner's statement

Our examination was carried out in accordance with general directions for an independent examination. An examination includes a review of the accounting records kept by the committee and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as a committee concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently we do not express an audit opinion on the view given by the accounts.

Independent examiner's statement

In connection with our examination, no matter has come to our attention:

1. which gives us reasonable cause to believe that in, any material respect, the requirements
 - to keep appropriate accounting records; and
 - to prepare accounts which accord with the accounting records and comply with applicable financial reporting standardshave not been met; or
2. to which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Community Accounting Services

**Community Accounting Services Ltd
7 Napoleon Drive
Shrewsbury
SY3 5PH**

Date: 09/01/2024

**Professionals with Alzheimer's United Kingdom
Income & Expenditure Accounts
for the Year Ended 31 March 2023**

	Unrestricted Funds 2023 £	Restricted Funds 2023 £	Total Funds 2023 £	<i>Total Funds 2022 £</i>
Income				
Donations	6,549	-	6,549	987
Sale of refreshments	95	-	95	178
Other income	74	-	74	150
Total Income	6,718	-	6,718	1,315
Expenditure				
Running costs				
Insurance	156	-	156	142
Accountancy	370	-	370	-
Speakers	-	-	-	70
Printing & stationery	553	-	553	82
Website costs	270	-	270	390
Computer costs	-	-	-	16
Venue hire	855	-	855	520
Refreshments	187	-	187	-
Sundry	18	-	18	46
Total Expenses	2,409	-	2,409	1,266
Net Incoming Resources Before Transfers	4,309	-	4,309	49
Transfer Between Funds	-	-	-	-
Net Incoming Resources	4,309	-	4,309	49
Fund balance brought forward at 1 April 2022	4,272	-	4,272	4,223
Fund Balance Carried Forward at 31 March 2023	8,581	-	8,581	4,272

The statement of financial activities includes all gains and losses recognised in the year. All incoming resources and resources expended derive from continuing activities.

**Professionals with Alzheimer's United Kingdom
Balance Sheet
2023**

Note	2023	2022
	£	£
Current Assets		
Bank	8,581	4,272
	8,581	4,272
Net Assets	8,581	4,272
Represented by Funds		
Unrestricted fund	8,581	4,272
Restricted funds	-	-
	8,581	4,272

The Trustees approve the accounts which comprise of the SOFA, the Balance Sheet and the related notes and acknowledge their responsibility for the accounts, including the appropriateness of the applicable financial reporting framework, and for providing Community Accounting Services Ltd with all information and explanations necessary for their compilation.

Elizabeth Andree Holdsworth
Chairman

Date

PALZ UK

England & Wales - Charity number 1190292

Accounts

Professionals with Alzheimer's United Kingdom

Accounts

For The Year Ended 31 March 2022

**Professionals with Alzheimer's United Kingdom
Reference and Administrative Details**

Charity Name	Professionals with Alzheimer's United Kingdom
Other Names	PALZ UK
Charity Number	1190292
Principal Address	Yew Tree Cottage Longnor Shrewsbury SY5 7PP
Trustee's	Elizabeth Andree Holdsworth Sarah Rachel Sharpe Philip John Davies Christine Kendall Katrina Eleanor Hall
Accountant	Community Accounting Services Ltd 7 Napoleon Drive Shrewsbury SY3 5PH

**Trustees' Report
of Professional with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2022**

The trustees present their annual report and financial statements of the charity for the year ended 31 March 2022. The financial statements have been prepared in accordance with the Charities Act 1993 and the Statement of Recommended Practice: Accounting and Reporting by Charities published in 2005.

Structure, Governance and Management

The charity is registered with the Charity Commission and is run in accordance with the Constitution adopted on 8 July 2020.

Trustee selection methods

New trustees are appointed by a resolution passed at a properly convened meeting of the charity trustees and individuals are selected having regard to the skills, knowledge and experience needed for the effective administration of the CIO.

The trustees have been provided with access to the Public Benefit Guides produced by the Charity Commission and have regard to that guidance.

Objectives and Activities

For the public benefit, the relief and assistance of people who have held challenging and demanding jobs and who are now living with Alzheimer's (or dementia from other causes), with a social environment of peer support and mental challenge which will provide self-respect, confidence, mental stimulation and involvement to those who attend and their supporters.

We support our community through:

- The provision of bi-monthly meetings including a talk by a high calibre speaker and the opportunity for discussion and socialising between participants in the early stages of a dementia diagnosis and their supporters in Shropshire.
- The provision of follow up visits or social activities depending on the preferences of participants as we develop.
- Providing an opportunity for participants and their supporters to re-experience the intellectually stimulating environment they once shared and to make connections and friendships with others in a similar situation.
- Working with a range of local and national organisations to promote awareness of the provision; to identify those that may benefit; and to facilitate referral pathways and learn from each other.
- Seeking opportunities for setting up groups in other areas in order to expand the provision throughout the UK.

Although aimed at professionals and business people with early dementia we have an inclusive approach, welcoming all people who wish to attend and who may benefit from the provision.

We do not replicate activities for people with advanced dementia or people who would prefer a health/care/church setting for whom existing excellent services are available.

PALZ UK focuses not on the disease but on the person who had an active, interesting life before being diagnosed with dementia.

PALZ UK is not just for people with dementia - it is a dementia friendly activity that everyone can enjoy.

Contributions made by Volunteers

PALZ UK does not currently have any paid staff and all work is carried out by volunteers. It is estimated that approximately 150 hours per month are provided by way of:

- Management of the charity
- Organising meetings
- Promoting the charity to potential referrers
- Communicating with and supporting participants and their supporters

Achievements and Performance in the year

The Covid 19 pandemic continued to disrupt the work of the organisation, particularly during the early part of the period but we were still able to achieve the following during the year:

- 4 face to face meetings with a speaker (also available on Zoom)
- 6 meetings on Zoom
- Regular contact with participants by phone and email to provide support and to update on developments
- Contribution of bi-monthly meetings of trustees, initially via Zoom and then in person when restrictions allowed
- Continuation of regular meetings of the Shropshire committee via Zoom
- Identifying charitable trusts to approach for funding and preparing and submitting funding applications
- Being enabled by sponsorship from AICO Ltd in Oswestry to make a video showing the benefits of PALZ. This was distributed to over 100 contacts further raising awareness of PALZ and thus introducing more people to the benefits of PALZ.
- Attendance at country-wide Dementia events and this further raising awareness
- Reviewing trustees' skills sets and seeking to identify potential new trustees for the organisation and recruiting two new trustees (one of whom replaced an existing trustee who retired due to other commitments)

**Trustees' Report
of Professional with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2022**

The difference we made to the circumstances of its beneficiaries during this period can be summed up in the words of beneficiaries and their supporters in the words of a letter received from the wife of one of our supporters which has been reproduced below:

November 2022 - Tony and I really appreciate the hard work that you and the PALZ committee do on behalf of ourselves and the rest of the group.

Having or living with someone who has dementia can be a very lonely place and since Tony's diagnosis, which is more than four years ago now, our lives have changed enormously.

We've always lived very full and active lives enjoying holidays across Europe in our motor home, having friends and family to stay or visit and taking part in a very active village life. We were also keen walkers and enjoyed among other things gardening, local history and socialising.

Sadly as Tony's memory has worsened his confidence has completely gone and he no longer wants to get involved with any social activities. He doesn't recognise friends and even some family members now so when we are invited to visit people or take part in a social event he gets understandably anxious. This means that I no longer enjoy the social life I once loved.

The one exception to this is attending the PALZ meetings. Since the first we came we instantly felt welcomed and 'at home' which is, I think, due to the similar experiences we share with the group. Our friends and family have all been wonderful and sympathetic to us but they don't truly understand what it's like on a day to day basis to have, or like with someone who has dementia.

The variety and balance of the meetings is excellent and offers something for everyone; from local history, to travel, to Shropshire raptors, and even a magician, who by the way was excellent. I'm certainly looking forward to hearing the retired judge at the next meeting. In addition to the speakers we also have talks from o/her service providers and gain valuable information about what's available to help us with day today living. All of this is done with such dignity, no one treats Tony as if he's no longer got a brain and, at the risk of once more repeating myself, it's his memory that he's lost not his intellect and PALZ understand that.

Even during the darkest days of lockdown when, especially for me, not seeing our friends and family was very lonely, we still had PALZ. The regular zoom meetings were something that kept us in touch with each other and gave me something to look forward to. The support we got helped us to get through the dreadful pandemic.

So again I'd like to thank you and the team for everything you have done for us and I wish you every success in spreading the word about PALZ across the country.

With fondest good wishes Pat

Financial Review

The charity's financial position is healthy and, as all work is currently carried out by volunteers, overheads remain small.

Reserves Policy

As overheads currently run at a very low level and we hold more than sufficient cash at bank to cover these for at least the next 6 months, we currently hold all funds in the same general account. However, we will monitor the use of funds and advise trustees at each general meeting whether funds are sufficient for PALZ UK to continue to operate. As the charity grows and overheads increase, it is proposed that we will work towards a reserves policy of 6 months to cover the likely cost of staff, activity and other over heads.

Risk Review

A detailed risk assessment has been carried out and will be formally reviewed annually, considered informally at each general meeting and updated accordingly. The most significant risks identified during this period were:

- The effect of the pandemic on provision of the service when face to face meetings were not possible. This was addressed by providing the service on-line and providing support by phone and email.
- Potential loss of the key trustee (the Chair) and this is being addressed by an active policy of identifying and seeking to recruit more trustees with the relevant skills to ensure the future of PALZ UK. During this period 2 new trustees were recruited, one with many years of experience in PR and marketing and involvement in fundraising for other organisations and the other with legal qualifications to replace an existing, legally qualified trustee who retired during this period. The requirement for further trustees was identified.

Declaration

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

Signed on behalf of the charity's trustees

Elizabeth Andree Holdsworth
Chairman

Date

**Independent Examiner's Report to the
Management Committee of Professionals with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2022**

Basis of independent examiner's report

We report on the accounts of Professionals with Alzheimer's United Kingdom for the year ended 31 March 2022.

The Group's officers are responsible for the preparation of the accounts. The Group's officers consider that an audit is not required for this year and that an independent examination is needed.

It is our responsibility to:

- examine the accounts
- to follow the general directions for the conduct of an independent examination
- to state whether particular matters have come to our attention.

Basis of independent examiner's statement

Our examination was carried out in accordance with general directions for an independent examination. An examination includes a review of the accounting records kept by the committee and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as a committee concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently we do not express an audit opinion on the view given by the accounts.

Independent examiner's statement

In connection with our examination, no matter has come to our attention:

1. which gives us reasonable cause to believe that in, any material respect, the requirements
 - to keep appropriate accounting records; and
 - to prepare accounts which accord with the accounting records and comply with applicable financial reporting standardshave not been met; or
2. to which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Community Accounting Services

**Community Accounting Services Ltd
7 Napoleon Drive
Shrewsbury
SY3 5PH**

Date: 25/01/2023

**Professionals with Alzheimer's United Kingdom
Income & Expenditure Accounts
for the Year Ended 31 March 2022**

	Unrestricted Funds 2022 £	Restricted Funds 2022 £	Total Funds 2022 £	<i>Total Funds 2021 £</i>
Income				
Grants	-	-	-	1,000
Donations	987	-	987	570
Sale of refreshments	178	-	178	-
Other income	150	-	150	-
Total Income	1,315	-	1,315	1,570
Expenditure				
Running costs				
Insurance	142	-	142	95
Speakers	70	-	70	103
Printing & stationery	82	-	82	-
Website costs	390	-	390	-
Computer costs	16	-	16	-
Venue hire	520	-	520	-
Sundry	46	-	46	-
Total Expenses	1,266	-	1,266	198
Net Incoming Resources Before Transfers	49	-	49	1,372
Transfer Between Funds	-	-	-	-
Net Incoming Resources	49	-	49	1,372
Fund balance brought forward at 1 April 2021	4,223	-	4,223	2,851
Fund Balance Carried Forward at 31 March 2022	4,272	-	4,272	4,223

The statement of financial activities includes all gains and losses recognised in the year. All incoming resources and resources expended derive from continuing activities.

**Professionals with Alzheimer's United Kingdom
Balance Sheet
2022**

Note	2022	2021
	£	£
Current Assets		
Bank	4,272	4,223
	4,272	4,223
Net Assets	4,272	4,223
Represented by Funds		
Unrestricted fund	4,272	4,223
Restricted funds	-	-
	4,272	4,223

The Trustees approve the accounts which comprise of the SOFA, the Balance Sheet and the related notes and acknowledge their responsibility for the accounts, including the appropriateness of the applicable financial reporting framework, and for providing Community Accounting Services Ltd with all information and explanations necessary for their compilation.

Elizabeth Andree Holdsworth
Chairman

Date

PALZ UK

England & Wales - Charity number 1190292

Accounts



Trustees' Annual Report for the period

From 8th July 2020
Period end date

Period start date To 31st March 2021

Charity name: Professionals with Alzheimer's United Kingdom

Charity registration number: 1190292

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	For the public benefit, the relief and assistance of people who have held challenging and demanding jobs and who are now living with Alzheimer's (or dementia from other causes), with a social environment of peer support and mental challenge which will provide self-respect, confidence, mental stimulation and involvement to those who attend and their supporters.
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	We support our community through: <ul style="list-style-type: none">• The provision of bi-monthly meetings including a talk by a high calibre speaker and the opportunity for discussion and socialising between participants in the early stages of a dementia diagnosis and their supporters in Shropshire.• The provision of follow up visits or social activities depending on the preferences of participants as we develop.• Providing an opportunity for participants and their supporters to re-experience the intellectually stimulating environment they once shared and to make connections and friendships with others in a similar situation• Working with a range of local and national organisations to promote awareness of the provision; to identify those that may benefit; and to facilitate referral pathways and learn from each other• Seeking opportunities for setting up groups in other areas in order to expand the provision throughout the UK

Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have been provided with access to the Public Benefit Guides produced by the Charity Commission and have regard to that guidance
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Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	<p>PALZ UK does not currently have any paid staff and all work is carried out by volunteers. It is estimated that approximately 150 hours per month are provided by way of:</p> <ul style="list-style-type: none"> • Management of the charity • Organising meetings • Promoting the charity to potential referrers • Communicating with and supporting participants and their supporters
Other		<p>Although aimed at professionals and business people with early dementia we have an inclusive approach, welcoming all people who wish to attend and who may benefit from the provision.</p> <p>We do not replicate activities for people with advanced dementia or people who would prefer a health/care/church setting for whom existing excellent services are available.</p> <p>PALZ UK focuses not on the disease but on the person who had an active, interesting life before being diagnosed with dementia. PALZ UK is not just for people with dementia – it is a dementia friendly activity that everyone can enjoy.</p>

Achievements and Performance

	SORP reference	
<p>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.</p>	<p>Para 1.20</p>	<p>The Covid 19 pandemic disrupted the work of the organisation but we were still able to achieve the following during the year:</p> <ul style="list-style-type: none"> • 1 face to face meeting with a speaker in October 2020) also available on Zoom) • 4 meetings on Zoom • 1 training course for participants and their supporters on the use of Zoom to allow them to participate in meetings • Regular contact with participants by phone and email to provide support and to update on developments • Drafting and approving policies and procedures for the organisation • Finalising our Business Plan, drafting of Governing Document and preparing and submitting application to the Charity Commission for charitable status • Carrying out a comprehensive risk assessment and preparation of Risk Management Statement • Continuation of bi-monthly meetings of trustees via Zoom • Continuation of regular meetings of the Shropshire committee via Zoom • Identifying charitable trusts to approach for funding and preparing and submitting funding applications • Reviewing trustees' skills set and seeking to identify potential new trustees for the organisation <p>The difference we made to the circumstances of its beneficiaries can be summed up in the words of beneficiaries and their supporters as follows:</p> <p><i>"We joined in August 2018 and were made so welcome. Since joining we've made lots of new friends with many different backgrounds, but all with one thing in common – Alzheimer's. This connection with other people struggling with the same issues really helped my husband and for once, in a long time he felt equal.</i></p> <p><i>We look forward to attending the meetings and have so much to discuss afterwards. It's been an enormous help to me too. I can talk to people who really understand what it's like to live with someone with the disease.</i></p> <p><i>Through PALZ we have made some</i></p>

		<p><i>really good friends whom I can call upon in a crisis. We get lots of sympathy from our friends and family, but with our PALZ friends we also get empathy.”</i></p> <p><i>“My husband and I have been married for 53 years and have always treated each other as equals. We both know that he struggles to remember day-to-day things, but I still see that clever and witty man that I’m married and love. After all, it’s his memory he’s lost, not his intellect. Thank goodness the people at PALZ also recognise this. I hope that there will be a time, in the not-too-distant future, when other PALZ groups will be rolled out across the country and many more Alzheimer’s sufferers can join a group that treats them with dignity, understanding and respect”</i></p> <p>Despite the challenges of lockdowns and the fact that many participants and potential participants were shielding 3 new participants and 3 new supporters joined the Shropshire group.</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		<p>The support we provided during this difficult year of the pandemic was appreciated by participants and their supporters as shown in the word of a supporter of a participant as set out below:</p> <p><i>“PALZ to us is so much more than just a social occasion &,both Geoff and I have looked forward to every meeting, even the Zoom meetings. It is quite difficult to</i></p>

explain but as soon as we met on the first meeting we were aware of the warmth and sincerity of you and those good people who assisted you. Meeting like minded people who once held positions of responsibility really helped plus entering into discussion with them. On entering the conference room you can feel the empathy between the people present which immediately makes one feel " at home".

When Geoff was first diagnosed four years ago we had frequent visits from members of the Community Psychiatric Department also a visit from a member of the Alzheimer's Society, then it was a follow up visit to their office once a year, since the onset of the pandemic disappointingly we have heard not a word from either.

So thank you to PALZ we remained in touch and were able to remain in contact with those whom had become more than just acquaintances."

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The charity's financial position is healthy and, as all work is currently carried out by volunteers, overheads remain small
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	As overheads currently run at a very low level and we hold more than sufficient cash at bank to cover these for at least the next 6 months, we currently hold all funds in the same general account. However, the Treasurer will monitor the use of funds and advise trustees at each general meeting whether funds are sufficient for PALZ UK to continue to operate. As the charity grows and overheads increase, it is proposed that we will work towards a reserves policy of 6 months to cover the likely cost of staff, activity and other over heads.
Amount of reserves held	Para 1.22	zero
Reasons for holding zero reserves	Para 1.22	As above
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	The principal sources of funding are: <ul style="list-style-type: none"> • Local grants and trusts • Individual private and business donors
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	A detailed risk assessment has been carried out and will be formally reviewed annually, considered informally at each general meeting and updated accordingly. The most significant risks identified during this period were: <ul style="list-style-type: none"> • The effect of the pandemic on provision of the service when face to face meetings were not possible. This was addressed by providing the service on-line and providing support by phone and email. • Potential loss of the key trustee (the Chair) and this is being addressed by an active policy of identifying and seeking to recruit more trustees with

		the relevant skills to ensure the future of PALZ UK.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution adopting the Charity Commission's model constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charitable Incorporated Organisation
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	New trustees are appointed by a resolution passed at a properly convened meeting of the charity trustees and individuals are selected having regard to the skills, knowledge and experience needed for the effective administration of the CIO

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	We have a written procedure for the induction of trustees and all trustees are encouraged to attend relevant on-line training courses
The charity's organisational structure and any wider network with which the charity works	Para 1.51	PALZ UK is led and managed by volunteer trustees. Currently there are 4 but the charity is seeking to recruit more. The PALZ Shropshire branch group is managed by a separate committee of volunteers. There are no paid staff. The charity is not part of an umbrella group.
Relationship with any related parties	Para 1.51	The charity was inspired by, is based on a similar model to, and has an informal affiliation with PALZ Global based in Australia but remains independent.
Other		

Reference and Administrative details

Charity name	Professional with Alzheimer's United Kingdom
Other name the charity uses	PALZ UK
Registered charity number	1190292
Charity's principal address	Yew Tree Cottage Longnor Shrewsbury SY5 7PP

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	Elizabeth Andree Holdsworth	Chair		
2	Janna Karine Vigar	Secretary		
3	Katrina Eleanor Hall	Treasurer		
4	Christine Kendall			
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Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

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	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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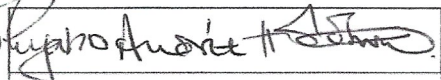
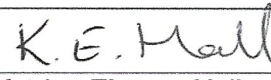
Other optional information

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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)	Elizabeth Andree Holdsworth	Katrina Eleanor Hall
Position (eg Secretary, Chair, etc)	Chair	Treasurer

Date

14.12.2021



CHARITY COMMISSION
FOR ENGLAND AND WALES

Professionals with Alzheimer's United Kingdom (PALZ U No (if any)

Receipts and payments accounts

For the period from	7/8/2020	To	3/31/2021
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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 £
A1 Receipts				
Grant funding	1,000	-	-	1,000
Business donations	250	-	-	250
Cash from Refreshments	-	-	-	-
Individual donations	320	-	-	320
	-	-	-	-
	-	-	-	-
	-	-	-	-
Sub total (Gross income for AR)	1,570	-	-	1,570
A2 Asset and investment sales, (see table).				
Cash Funds	2,851	-	-	2,851
	-	-	-	-
Sub total	2,851	-	-	2,851
Total receipts	4,421	-	-	4,421
A3 Payments				
Insurance	95	-	-	95
Payments to speakers	103	-	-	103
Printing costs	-	-	-	-
Consultancy Fees	-	-	-	-
Website hosting & domain	-	-	-	-
Advertising	-	-	-	-
Retirement Gift	-	-	-	-
	-	-	-	-
Sub total	198	-	-	198
A4 Asset and investment purchases, (see table)				
	-	-	-	-
	-	-	-	-
Sub total	-	-	-	-
Total payments	198	-	-	198
Net of receipts/(payments)	4,223	-	-	4,223
A5 Transfers between funds	-	-	-	-
A6 Cash funds last year end	-	-	-	-
Cash funds this year end	4,223	-	-	4,223

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £
B1 Cash funds	Santander Business Account	3,932	-
		-	-
		-	-
	Total cash funds	3,932	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK

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

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

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

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

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

Signature	Print Name

CC16a



Last year

to the nearest £

-
2,024
415
-
-
-
-
2,439

1,464
-
1,464

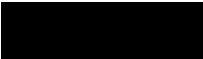
3,903

95
120
352
150
228
86
20
-
1,051

-

1,051

2,852
-
-
2,852



Endowment funds

to nearest £

-
-
-
-

OK

Endowment funds

to nearest £

-
-
-
-
-
-

Current value (optional)

-
-
-
-
-

Current value (optional)

-
-
-
-
-
-
-
-
-

When due (optional)

Date of approval
