

**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  
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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:

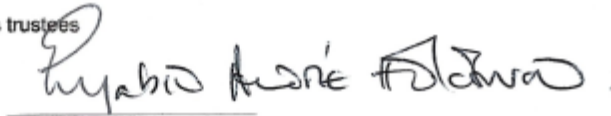
- Failure to set up any further groups (in addition to the Shropshire group) but discussions are taking place with interested parties in a number of different areas
- Potential loss of the key trustee (the Chair) and this is being addressed by an active policy of identifying and seeking to recruit more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

	<b>Unrestricted Funds 2024 £</b>	<b>Restricted Funds 2024 £</b>	<b>Total Funds 2024 £</b>	<i>Total Funds 2023 £</i>
<b>Income</b>				
Donations	2,887	-	2,887	6,549
Sale of refreshments	-	-	-	95
Other income	37	-	37	74
<b>Total Income</b>	<u>2,924</u>	<u>-</u>	<u>2,924</u>	<u>6,718</u>
<b>Expenditure</b>				
<b>Running costs</b>				
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
<b>Total Expenses</b>	<u>2,535</u>	<u>-</u>	<u>2,535</u>	<u>2,409</u>
<b>Net Incoming Resources Before Transfers</b>	389	-	389	4,309
<b>Transfer Between Funds</b>	-	-	-	-
<b>Net Incoming Resources</b>	<u>389</u>	<u>-</u>	<u>389</u>	<u>4,309</u>
Fund balance brought forward at 1 April 2023	8,581	-	8,581	4,272
<b>Fund Balance Carried Forward at 31 March 2024</b>	<u><u>8,970</u></u>	<u><u>-</u></u>	<u><u>8,970</u></u>	<u><u>8,581</u></u>

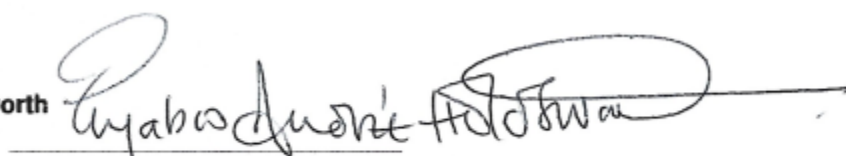
The statement of financial activities includes all gains and losses recognised in the year. All incoming resources and resources expended derive from continuing activities.

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

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

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**

