

Trustees' Annual Report and Accounts: Suffolk and Norfolk Yeomanry Trust

Charitable Incorporated Organisation

Trustees' annual report for the period

Period start date	Period end date
Da Mont Year	Da Mont Year

Reference and administration details

Charity name *Suffolk and Norfolk Yeomanry Trust*

Other names charity is known by

Registered charity number (if any) 1192976

Charity's principal address Muckleburgh Military Collection

Weyborne

Sheringham Norfolk

Postcode NR25 7EH

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)
<i>Simon Fowler</i>	<i>Chairman</i>		
<i>Gary Walker</i>	<i>Secretary and Curator</i>		
<i>Trevor Jones</i>	<i>Treasurer</i>		
<i>Peter Britten</i>	<i>Trustee</i>		
<i>Brian Greengrass</i>	<i>Trustee</i>		
<i>Martin Long</i>	<i>Trustee</i>		
<i>Stephen Reynolds</i>	<i>Trustee</i>		

Structure, governance and management

Description of the charity's trusts

Type of governing document
(eg. trust deed, constitution)

Constitution adopted 5 Jan 2021

How the charity is constituted
(eg. trust, association, company)

Charitable Incorporated Organisation

Trustee selection methods
(eg. appointed by, elected by)

Trustees are appointed or reappointed annually at the Annual General Meeting held in January

Objectives and activities

Summary of the objects of the charity set out in its governing document

Objects

The objects of the CIO are to hold the museum artefacts, the Regimental Silver Collection and all other assets and charitable funds currently held by the Trustees of a Scheme dated 27th September 1978 and a Trust created by a Deed dated 3rd February 1986 (charity no. 293764) to apply the same as follows:

Summary of the main activities undertaken for the public benefit in relation to these objects

- (1) Issuing grants to the Suffolk & Norfolk Yeomanry Associations for the relief of need of persons who have served in the former units comprising the Suffolk Yeomanry and the Norfolk Yeomanry and to the maintenance of the welfare of members of such Associations;
- (2) Making donations to ex servicemen's hospitals homes or institution;
- (3) Ensuring that the Museum Artefacts are housed in an appropriate museum provided that satisfactory arrangements exist for the preservation maintenance and insurance of all such items: and
- (4) Ensuring the Regimental Silver Collection is kept in a safe location and fully protected and insured:

Achievements and performance

Summary of the main achievements of the charity during the year.

The Trusts historical collection was available for viewing by the public throughout the reporting period, it being displayed in the Muckleburgh Military Museum, at no cost to the Trust and with the Museum covering the annual estimated insurance premium.

A revised Deed, covering the safekeeping and display of the Trust's assets, agreed by the Chair of Trustees with the owner of the Muckleburgh Military Museum is in place and is working satisfactorily for both parties.

The Trust's silver collection remains on display at the Royal Artillery Barracks, Woolwich, with items also being displayed at the Sandringham Flower Show in July, for viewing by the public.

Financial review

Brief statement of the charity's policy on reserves

Cash at bank at 31/03/2024 was £621.95 in unrestricted funds. Held in investment accounts £17787.84
There has been little by the way of financial activity, this mitigated by reductions in the annual maintenance costs of the historical collection. In addition, there is little anticipated future expenditure, the investment fund being reserved for the needs of any future restoration projects, while the banked reserves are being reserved for routine expenditure.

Details of any funds materially in deficit

Not applicable

Further financial review details: (Optional information)

You **may choose** to include additional information, where relevant about:

The charity's principal sources of funds (including any fundraising).

How expenditure has supported the key objectives of the charity.

Investment policy and objectives including any ethical investment policy adopted.

The main source of the Trusts unrestricted income is generated from the interest on investments held by the Charity.
Outgoings are, however, minimal and there would be no degradation of the charitable objectives were income from the investment source decrease.

Other optional information

Future Plans

The coming year will see a continued emphasis maintenance of the Collection for the general viewing by the public and the making of historical records available for on line viewing via the Ogilvy Muster website.

Declaration

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

on behalf of the charity's trustees

Signature(s)	G Walker	S Fowler
Full name(s)	Gary Walker	Simon Fowler
Position (eg secretary, chair, etc)	Secretary	Charman

Date 01 Oct 2024

Charity Name

Suffolk and Norfolk Yeomanry Trust



Receipts and payments accounts

for the period	Period start date 31/03/2023	To	Period end date 31/03/2024
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Section Accounts and Payments

Unrestricted funds 31 Mar 2023	Restricted funds to the nearest £	Total funds 31 Mar 2024
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A1 Receipts

Bank Account - Lloyds	621	-
Investments - NorthernTrust (98902)	4225	-
Investments - NorthernTrust (94612)	12282	-
Misc Income	-	-
Interest	0	-
Gift aid receipts	-	-
Sub total	17127	-

621
4584
13203
-
-
-
18408

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	Cash at Bank	621	-
	Investments	17787	-
	Total cash funds	18408	-
	(agree balances with receipts and payments account(s))		
B2 Other monetary assets		-	-
		-	-

Signed (on behalf of
all the trustees)

G Walker