LINCOLN PRIVATE INVESTMENT OFFICE FOUNDATION

England & Wales · Charity number 1194299

Details

Status	Registered
Legal form	Trust
Registered	2021-04-30
Register	View on the Charity Commission register

Contact

Address	32 Grosvenor Gardens London SW1W 0DH
Phone	020739097507
Email	louisa.carruthers@lpio.co.uk

Activities

Objects: TO ADVANCE SUCH CHARITABLE PURPOSES (ACCORDING TO THE LAW OF ENGLAND AND WALES) AS THE TRUSTEES SEE FIT FROM TIME TO TIME.

Activities: Lincoln Foundation will not make grants to individuals. Lincoln Foundation only makes grants to other charities that are registered with the Charity Commission for England and Wales. The trustees do not currently accept grant requests. The trustees will research and review potential charities.

Classification

- **How:** Makes Grants To Organisations
- **What:** General Charitable Purposes
- **Who:** Other Charities Or Voluntary Bodies

Geography

- Throughout England

Finances

Period end	Income	Expenditure	Assets	Employees
2025-12-31	£45,665	£8,124	-	-
2024-12-31	£17,488	£12,250	-	-
2023-12-31	£5,111	£3,750	-	-
2022-12-31	£11,751	£8,000	-	-
2021-12-31	£9,098	£11,100	-	-

Trustees

Name	Role	Appointed
Thomas Michael Braithwaite	Chair	2025-01-01
Angus Sallis Holmes		2024-01-01
Christopher John Rowell		2019-03-19
Giorgina Baldwin		2025-01-01
Louisa Catherine Berry		2019-03-19
Rebecca Sara Robbins		2019-03-19

Accounts

LINCOLN PRIVATE INVESTMENT OFFICE FOUNDATION

FINANCIAL STATEMENTS

FOR THE YEAR ENDED ON 31 DECEMBER 2025

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Foundation Information

Charity's Name	Lincoln Private Investment Office Foundation
Charity's registration number	1194299
Trustees	Thomas Michael Braithwaite (Chair) Giorgina Baldwin Angus Sallis Holmes Louisa Catherine Berry Christopher John Rowell Rebecca Sara Robbins Josephine Waldron (resigned on 1st Jan 2025)
Principal address	32 Grosvenor Gardens London SW1W 0DH
Investment managers	Lincoln Private Investment Office 32 Grosvenor Gardens London SW1W 0DH
Bankers	Barclays Bank
Independent examiners	Tax Avenue Turnfields Gate, Turnfields Thatcham RG19 4PT

TRUSTEES' ANNUAL REPORT

The Trustees of Lincoln Private Investment Office Foundation present their report and financial statements for the year ended on 31 December 2025. The financial statements have been prepared in accordance with the accounting policies set out in the notes to the accounts and comply with the charity's governing document, the Charities Act 2011, and Accounting and Reporting by Charities: Statement of Recommended Practice.

Objectives and Activities

The foundation's core objective is to provide financial support to registered charities in England and Wales. We focus on organisations that operate within the United Kingdom and maintain a primary mission of improving human lives. Our grant-making strategy aims to provide both immediate relief and long-term support to vulnerable populations.

The Trustees confirm they have referred to the Charity Commission's general guidance on public benefit when reviewing the foundation's aims and objectives and in planning future activities.

Achievements and Performance

The foundation experienced a successful year of fundraising in 2025, generating a total income in excess of £45,000. This revenue was largely driven by the physical dedication of our supporters and the engagement of our local community. Key activities included:

- Participation in high-endurance events (the Ironman triathlon and the London Marathon)
- Organisation of a "guess the number of tennis balls" competition held at the Hurlingham tennis tournament
- Organisation of a quiz night.

The Trustees are proud of the grant awarded this year to Become Charity. The £7,000 grant supports Become's vital work in improving the life chances of young people in care and care leavers. This partnership aligns perfectly with our human-focused mission by addressing systemic challenges faced by young people in the United Kingdom.

Financial Review

Total income for the year was £45,665. In line with our long-term strategy to ensure the foundation's sustainability, the Trustees made a significant investment of £30,000 into our existing stocks and shares portfolio. This investment is intended to provide a reliable source of future income and capital growth, enabling larger or more frequent grants in subsequent years.

The foundation maintains a policy of holding sufficient reserves to meet its grant-making commitments and cover administrative costs. The remaining balance from the 2025 fundraising cycle will be carried forward to support the 2026 grant cycle.

Structure, Governance, and Management

The foundation is a registered charity governed by its Trust Deed dated 19 March 2019. The power of appointing new Trustees is vested in the current Board of Trustees. New Trustees are inducted into the workings of the foundation and briefed on their legal obligations under charity law. The trustees give their time voluntarily and receive no remuneration nor any other financial benefits.

The Trustees meet twice a year to review grant applications, monitor investment performance, and plan future fundraising initiatives.

Declaration

The Trustees declare that they have approved the report above.

Signed on behalf of the Board of Trustees:

Thomas Michael Braithwaite
Chair of Trustees

Date: 1st June 2026

INDEPENDENT EXAMINER'S REPORT
TO THE TRUSTEES OF
LINCOLN PRIVATE INVESTMENT OFFICE FOUNDATION

I report to the trustees on my examination of the accounts of Lincoln Private Investment Office Foundation for the year ended on 31 December 2025.

Responsibilities and basis of report

As the charity trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Foundation's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

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

1. accounting records were not kept in respect of the Foundation as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

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

Signed:

Monika Tabatabaian, MAAT

Tax Avenue

1 May 2026

LINCOLN PRIVATE INVESTMENT OFFICE FOUNDATION

STATEMENT OF FINANCIAL ACTIVITIES

For the year ended on 31 December 2025

	Notes	2025 £	2024 £
Resources arising:			
Fundraising activities	2	45,371	17,365
Investment income		294	123
Gross resources for the year		45,665	17,488
Resources used:			
Costs of fundraising activities		1,124	-
Grants and donations made		7,000	12,250
Administration costs		-	-
Resources used in the year		8,124	12,250
Changes in resources			
Before transfers and valuations		37,541	5,238
Net investment (loss) / gain		2,942	-
Net movement in resources for the year		40,483	5,238
Reconciliation of funds			
Balance brought forward		14,305	9,067
Net movement in resources		40,483	5,238
Balance carried forward		54,788	14,305
Represented by			
Investments	3	46,466	13,230
Cash in bank		8,322	1,075
Total		54,788	14,305

Signed on behalf of the Board of Trustees:

Signature	Name in print	Date
	T BRAITHWAITE	1st June 2026
	CHRIS ROWELL	1ST JUNE 2026

LINCOLN PRIVATE INVESTMENT OFFICE FOUNDATION

NOTES TO THE ACCOUNTS

For the year ended on 31 December 2025

ACCOUNTING POLICIES

The accounts have been prepared on the receipts and payments basis.

FUNDRAISING ACTIVITIES INCOME AND EXPENSES

	2025
	£
Income	
Hurlingham Tennis	1,983
Quiz Night	3,866
Marathon	1,375
Ironman	37,027
Sweepstake	295
Sundry donations	825
	45,371
Expenses	
Quiz Night venue and snacks	1,124
Excess of income over expenses	44,247

INVESTMENTS

Investments are held in a porftolio of stocks and shares managed by Lincoln Private Investment Office.

	2025
	£
Market value (as per Investment Managers valuation)	
Brought forward	13,230
New investments	30,000
Income re-invested	294
Increase/decrease in market value	2,942
Carried forward	46,466