

THE LUKE WHEATON LEGACY TRUST

England & Wales · Charity number 1194925

Details

Other names	LUKE'S LEGACY TRUST
Status	Registered
Legal form	CIO
Registered	2021-06-23
Register	View on the Charity Commission register

Contact

Address
Bradley Stoke Community School
Fiddlers Wood Lane
Bradley Stoke
Bristol
BS32 9BS

Phone 01454868872

Email contact@lukeslegacytrust.org

Website www.lukeslegacytrust.org

Activities

Objects: 3.1 THE OBJECTS OF THE CIO ARE:(A) TO ADVANCE THE VOCATIONAL TRAINING AND PHYSICAL EDUCATION OF PUPILS AT BRADLEY STOKE COMMUNITY SCHOOL AND OTHER OLYMPUS ACADEMY TRUST SCHOOLS, IN PARTICULAR BUT NOT EXCLUSIVELY BY PROVIDING AND ASSISTING IN THE PROVISION OF FINANCIAL OR OTHER ASSISTANCE TO:(I) RECOGNISE AND REWARD VOCATIONAL AND/OR SPORTING EXCELLENCE; AND/OR(II) ENABLE SUCH PERSONS TO PREPARE FOR ENTRY INTO ANY OCCUPATION, TRADE OR PROFESSION ON LEAVING ANY EDUCATIONAL ESTABLISHMENT;(B) TO ADVANCE IN LIFE AND HELP YOUNG ATHLETES IN SOUTH GLOUCESTERSHIRE AND SURROUNDING AREAS WHO HAVE NEED BY REASON OF THEIR YOUTH, AGE, INFIRMITY OR DISABILITY, POVERTY OR SOCIAL AND ECONOMIC CIRCUMSTANCES WITH A VIEW TO IMPROVING THE CONDITIONS OF LIFE AND ADVANCING THE EDUCATION OF SUCH PERSONS, IN PARTICULAR BUT NOT EXCLUSIVELY BY PROVIDING GRANTS AND ITEMS TO INDIVIDUALS IN NEED AND/OR CHARITIES OR OTHER ORGANISATIONS WORKING TO SUPPORT SUCH PERSONS; AND(C) TO ADVANCE IN LIFE AND HELP YOUNG ATHLETES IN SOUTH GLOUCESTERSHIRE AND SURROUNDING AREAS, IN PARTICULAR BUT NOT EXCLUSIVELY BY PROVIDING AND ASSISTING IN THE PROVISION OF FINANCIAL OR OTHER ASSISTANCE TO RECOGNISE AND REWARD SPORTING EXCELLENCE.

Activities: OBJECTS To provide financial support for students within the LA wanting to follow vocational study and who require equipment or other support to access their courses/qualifications and to support local sports clubs and local sport in schools financially with equipment and/or other resources to enable the children and young people to take part and enjoy their sporting activities.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations
- **What:** Education/training, Disability, Amateur Sport
- **Who:** Other Defined Groups

Geography

- Throughout England

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£49,293	£16,764	-	-
2024-03-31	£28,023	£16,311	-	-
2023-03-31	£14,817	£13,307	-	-
2022-03-31	£44,974	£4,495	-	-

Trustees

Name	Role	Appointed
Jamie Matthew Wheaton	Chair	2020-06-23
Andrew Young		2020-06-23
Jamie Mayes		2022-06-29
Martin Phillip Randall		2022-06-29
Matthew John Wheaton		2020-06-23
Paula Miles		2020-06-23
Simon Bryant		2020-06-23
Steve Moir		2020-06-23

THE LUKE WHEATON LEGACY TRUST

England & Wales - Charity number 1194925

Accounts



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Trustees' Annual Report for the period

From 1st April 2024 To 31st March 2025

Charity name: The Luke Wheaton Legacy Trust

Charity registration number: 1194925

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>(a) To advance the vocational training and physical education of pupils at Bradley Stoke Community School and other Olympus Academy Trust schools, in particular but not exclusively by providing and assisting in the provision of financial or other assistance to: (i) recognise and reward vocational and/or sporting excellence;</p> <p>and/or</p> <p>(ii) enable such persons to prepare for entry into any occupation, trade or profession on leaving any educational establishment;</p> <p>(b) to advance in life and help young athletes in South Gloucestershire and surrounding areas who have need by reason of their youth, age, infirmity or disability, poverty or social and economic circumstances with a view to improving the conditions of life and advancing the education of such persons, in particular but not exclusively by providing grants and items to individuals in need and/or charities or other organisations working to support such persons;</p> <p>And</p> <p>(c) to advance in life and help young athletes in South Gloucestershire and surrounding areas, in particular but not exclusively by providing and assisting in the provision of financial or other assistance to recognise and reward sporting excellence.</p>
Summary of the main	Para 1.17 and	We continue to help young people excel

activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	1.19	both as individuals and through group sports and activities. Along side this we have put on our an apprenticeship open evening and have been promoting the benefits of apprenticeships.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	All trustees have been required to read and have regard to the guidance issued by the Charity Commission on public benefit before becoming a trustee.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	NA
Policy on social investment including program related investment	Para 1.38	NA
Contribution made by volunteers	Para 1.38	NA
Other		NA

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>Over the past year, we have made significant progress in improving the lives of our beneficiaries and contributing to society as a whole. Through targeted programs and strategic partnerships, we have delivered measurable outcomes that reflect our mission and vision.</p> <p>Key Achievements</p> <p>We continue to financially support sports clubs, with a particular focus on promoting girls' football, rugby and tennis. Encouraging inclusivity and equal opportunities in sports.</p> <p>Supporting Access to Sport and Opportunity</p> <p>Over the past year, we have continued to support young people facing financial and social barriers to participation in sport, helping them access opportunities that would otherwise be out of reach.</p> <p>One young athlete was selected to represent their college at an international youth rugby tournament overseas. The total cost of participation was significant and well beyond what their family could reasonably afford. While fundraising and part-time work contributed towards the costs, additional support was required to ensure the opportunity was not lost due to financial circumstances. This case reflects a wider challenge faced by talented young people from lower-income households, where ability and commitment alone are not enough to overcome economic barriers.</p> <p>The beneficiary lives in a low-income household with multiple dependents and limited financial flexibility. Although day-to-day needs are met, opportunities such as international competition remain inaccessible without external support. Our involvement helped reduce financial pressure and ensured the individual could continue their sporting</p>

development alongside their education.

Grassroots Sport and Community Impact

Through partnerships with local rugby clubs and community organisations, we have supported children who would otherwise struggle to access organised sport. Funding has been used to cover essential costs including travel, playing kit, boots, club subscriptions, equipment and post-match meals. We also supported a small number of children to experience organised sports tours for the first time.

In addition, we provided protective sports equipment such as shin pads and gum shields to local schools, enabling pupils without the necessary resources to take part fully in physical education sessions. The impact of this support is often immediate and visible, with increased participation, confidence and enjoyment among the children involved.

Feedback from coaches highlights that, while not every child will progress to elite performance, the wider benefits are substantial. Regular training, structure and inclusion provide stability, routine and positive role models. Parents have expressed significant gratitude for the scheme, noting that without this support their children would not be able to participate due to the associated costs.

Mentoring and Early Intervention

Alongside sport, we have continued to deliver mentoring support within schools, focusing on students facing challenges related to mental health, behaviour, attendance and engagement with education.

Our mentoring programmes have demonstrated clear outcomes:

- Improved relationships between students and trusted adults
- Reduced behavioural incidents, with one student's recorded consequences reducing by over 50% in a year

		<ul style="list-style-type: none"> • Improved attendance, including cases where attendance nearly doubled within a single term • Increased confidence and engagement in learning <p>Mentoring plays a critical role in supporting students who fall outside traditional funding thresholds, particularly where access to EHCP or SEND resources is limited. Early intervention helps prevent disengagement before it escalates into persistent non-attendance, which is significantly harder to reverse.</p> <p>By providing consistent, targeted support, mentoring helps students re-engage with education, develop aspirations and build the skills needed for long-term success.</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	NA
Performance of fundraising activities against objectives set	Para 1.41	<p>We have held another annual fundraising event ‘Luke’s Event’ along with raffles, and auctions. Local sports clubs have held memorial matches and individuals have raised money through sponsorship for events such as Three peaks challenge and running events.</p> <p>We have beat our fundraising target by almost 20k this year.</p>
		NA

Investment performance against objectives	Para 1.41	
Other		NA

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	TBC
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	TBC
Amount of reserves held	Para 1.22	TBC
Reasons for holding zero reserves	Para 1.22	TBC
Details of fund materially in deficit	Para 1.24	TBC
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	TBC

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	Annual sports tournaments and family day at NBRFC. Other fundraising activities by individuals, clubs and donations from businesses.
Investment policy and objectives including any social investment policy adopted	Para 1.46	NA
A description of the principal risks facing the charity	Para 1.46	NA

Other		NA
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Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Trust deed
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	<p>Eligibility for trusteeship</p> <p>(a) Every charity trustee must be a natural person.</p> <p>(b) No one may be appointed as a charity trustee: (i) if he or she is under the age of 16 years; or (ii) if he or she would automatically cease to hold office under the provisions of clause 15.1(f).</p> <p>(c) No one is entitled to act as a charity trustee whether on appointment or on any re-appointment until he or she has expressly acknowledged, in whatever way the charity trustees decide, his or her acceptance of the office of charity trustee.</p> <p>(d) At least one of the trustees of the CIO must be 18 years of age or over. If there is no trustee aged at least 18 years, the remaining trustee or trustees may act only to call a meeting of the charity trustees, or appoint a new charity trustee.</p> <p>Elected charity trustees</p> <p>(a) Following the first annual general meeting of the members of the CIO, one-third of the elected charity trustees shall retire from office every three (3) years. If the number of elected charity trustees is not three or a multiple of three, then the number nearest to one-third shall retire from office, but if there is only one charity trustee, he or she shall retire;</p> <p>(b) The charity trustees to retire by rotation shall be those who have been longest in office since their last appointment or reappointment. If any trustees were last appointed or reappointed on the same day those to retire shall (unless they otherwise</p>

agree among themselves) be determined by lot;
(c) The vacancies so arising may be filled by the decision of the members

at the annual general meeting; any vacancies not filled at the annual general meeting may be filled as provided in sub-clause (d) of this clause;

(d) The charity trustees may at any time decide to appoint a new charity trustee, whether in place of a charity trustee who has retired or been removed in accordance with clause 15 (Retirement and removal of charity trustees), or as an additional charity trustee, provided that the limit specified in clause 12.3 on the number of charity trustees would not as a result be exceeded;

(e) A person so appointed by the members of the CIO shall retire in

accordance with the provisions of sub-clauses (a) and (b) of this clause. A

person so appointed by the charity trustees shall retire at the conclusion of the annual general meeting next following the date of his appointment, and shall not be counted for the purpose of determining which of the charity trustees is to retire by rotation at that meeting.

13.2 Nominated Charity Trustees

(a) Bradley Stoke Community School, Bradley Stoke Youth Football Club, North Bristol Rugby Football Club and Stoke Lane Football Club (each an "Appointing Body" and together, the "Appointing Bodies") may each appoint one (1) charity trustee.

(b) Any appointment must be made at a meeting held according to the ordinary practice of the appointing body.

(c) Each appointment must be for a term of three (3) years.

(d) The appointment will be effective from the later of: (i) the date of the vacancy; or (ii) the date on which the CIO is informed of the appointment.

(e) The person appointed need not be a member of the appointing body.

(f) A trustee appointed by the appointing body has the same duty under Clause 12.1 as the other charity trustees to act in the way he or she decides in good faith would be

		most likely to further the purposes of the CIO.
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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	NA
The charity's organisational structure and any wider network with which the charity works	Para 1.51	NA
Relationship with any related parties	Para 1.51	NA
Other		NA

Reference and Administrative details

Charity name	The Luke Wheaton Legacy Trust
Other name the charity uses	Luke's Legacy Trust
Registered charity number	1194925
Charity's principal address	Bradley Stoke Community School Fiddler's Wood Lane Bradley Stoke

	BS32 9BS

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	Jamie Wheaton	Chair		
2	Paula Miles	Treasurer		
3	Matt Wheaton			
4	Andy Young	Vice Chair		
5	Steve Moir			
6	Martin Randall			
7	Simon Bryant			
8	Jamie Mayes			
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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)		

Exemptions from disclosure

Reason for non-disclosure of key personnel details

Other optional information

Fundraising costs (trading activities)	-	-	-	-	-
Printing, postage, stationery and computer supplies	-	-	-	-	261
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	16,764	-	-	16,764	16,311
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	16,764	-	-	16,764	16,311
Net of receipts/(payments)	32,529	-	-	32,529	11,713
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	32,529	-	-	32,529	11,713

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

Categories	Details	Unrestricted to nearest £	Restricted funds to nearest £	Endowment to nearest £
B1 Cash funds			-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
	Total cash funds	-	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK
		Unrestricted	Restricted funds	Endowment

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

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

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

Categories	Details	Fund to which	Amount due	When due
B5 Liabilities			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval
		Jamie Wheaton	02/01/2026



Independent examiner's report on the
accounts

Report to the trustees

Charity Name
The Luke Wheaton Legacy Trust

On accounts for the year
ended

31st March 2025

Charity no
(if any)

1194925

Set out on pages

1,2,3

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31/03/2025**

Responsibilities and basis
of report

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

Independent examiner's
statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me

come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did 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:

Date:

12/01/2025

Name:

Paul Richards

Relevant professional
qualification(s) or body (if
any):

N/A



any):

Address:	15 convent Close
	BS10 7XQ



Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

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THE LUKE WHEATON LEGACY TRUST

England & Wales - Charity number 1194925

Accounts



Trustees' Annual Report for the period

From 1st April 2023 To 31st March 2024

Charity name: The Luke Wheaton Legacy Trust

Charity registration number: 1194925

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	(a) To advance the vocational training and physical education of pupils at Bradley Stoke Community School and other Olympus Academy Trust schools, in particular but not exclusively by providing and assisting in the provision of financial or other assistance to: (i) recognise and reward vocational and/or sporting excellence; and/or (ii) enable such persons to prepare for entry into any occupation, trade or profession on leaving any educational establishment; (b) to advance in life and help young athletes in South Gloucestershire and surrounding areas who have need by reason of their youth, age, infirmity or disability, poverty or social and economic circumstances with a view to improving the conditions of life and advancing the education of such persons, in particular but not exclusively by providing grants and items to individuals in need and/or charities or other organisations working to support such persons; And (c) to advance in life and help young athletes in South Gloucestershire and surrounding areas, in particular but not exclusively by providing and assisting in the provision of financial or other assistance to recognise and reward sporting excellence.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the	Para 1.17 and 1.19	We continue to help young people excel both as individuals and through group sports and activities. Along side this we have put on our an apprenticeship open

activities, projects or services identified in the accounts.		evening and have been promoting the benefits of apprenticeships.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	All trustees have been required to read and have regard to the guidance issued by the Charity Commission on public benefit before becoming a trustee.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	NA
Policy on social investment including program related investment	Para 1.38	NA
Contribution made by volunteers	Para 1.38	NA
Other		NA

Achievements and Performance

	SORP reference	
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.	Para 1.20	<p>Over the past year, we have made significant progress in improving the lives of our beneficiaries and contributing to society as a whole. Through targeted programs and strategic partnerships, we have delivered measurable outcomes that reflect our mission and vision.</p> <p>Key Achievements</p> <ol style="list-style-type: none"> 1. Support for Sports and Physical Activities: <ul style="list-style-type: none"> ○ Provided sports kits and equipment to multiple individuals, enabling them to participate in physical activities and develop their talents.

		<ul style="list-style-type: none"> ○ Contributed towards children's gymnastics and athletics costs, fostering physical development and promoting healthy lifestyles. ○ Financially supported sports clubs, with a particular focus on promoting girls' football, encouraging inclusivity and equal opportunities in sports. <p>2. Talent Development in Sports:</p> <ul style="list-style-type: none"> ○ Offered financial assistance to young people showing potential in tennis, ensuring they could continue with lessons and progress in the sport despite financial barriers. <p>3. Special Educational Needs (SEN) Support:</p> <ul style="list-style-type: none"> ○ Supplied SEN schools with specialized equipment such as mountain bikes and facilitated horse riding trips, providing unique experiences that support physical and emotional development. <p>4. Luke's Gym Expansion:</p> <ul style="list-style-type: none"> ○ Continued the expansion of Luke's gym at Bradley Stoke Community School, promoting fitness and well-being among young people.
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	NA
Performance of fundraising activities against objectives set	Para 1.41	We have held another annual fundraising event 'Luke's Event' along with raffles, and auctions. Local sports clubs have held memorial matches and individuals have raised money through sponsorship for events such as Three peaks challenge and running events.

		We have beat our fundraising target by almost 5k this year.
Investment performance against objectives	Para 1.41	NA
Other		NA

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	TBC
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	TBC
Amount of reserves held	Para 1.22	TBC
Reasons for holding zero reserves	Para 1.22	TBC
Details of fund materially in deficit	Para 1.24	TBC
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	TBC

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	Annual sports tournaments and family day at NBRFC. Other fundraising activities by individuals, clubs and donations from businesses.
Investment policy and objectives including any social investment policy adopted	Para 1.46	NA
A description of the principal risks facing the charity	Para 1.46	NA
Other		NA

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Trust deed
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	<p>Eligibility for trusteeship</p> <p>(a) Every charity trustee must be a natural person.</p> <p>(b) No one may be appointed as a charity trustee: (i) if he or she is under the age of 16 years; or (ii) if he or she would automatically cease to hold office under the provisions of clause 15.1(f).</p> <p>(c) No one is entitled to act as a charity trustee whether on appointment or on any re-appointment until he or she has expressly acknowledged, in whatever way the charity trustees decide, his or her acceptance of the office of charity trustee.</p> <p>(d) At least one of the trustees of the CIO must be 18 years of age or over. If there is no trustee aged at least 18 years, the remaining trustee or trustees may act only to call a meeting of the charity trustees, or appoint a new charity trustee.</p> <p>Elected charity trustees</p> <p>(a) Following the first annual general meeting of the members of the CIO, one-third of the elected charity trustees shall retire from office every three (3) years. If the number of elected charity trustees is not three or a multiple of three, then the number nearest to one-third shall retire from office, but if there is only one charity trustee, he or she shall retire;</p> <p>(b) The charity trustees to retire by rotation shall be those who have been longest in office since their last appointment or reappointment. If any trustees were last appointed or reappointed on the same day those to retire shall (unless they otherwise agree among themselves) be determined by lot;</p> <p>(c) The vacancies so arising may be filled by the decision of the members</p>

	<p>at the annual general meeting; any vacancies not filled at the annual general meeting may be filled as provided in sub-clause (d) of this clause;</p> <p>(d) The charity trustees may at any time decide to appoint a new charity trustee, whether in place of a charity trustee who has retired or been removed in accordance with clause 15 (Retirement and removal of charity trustees), or as an additional charity trustee, provided that the limit specified in clause 12.3 on the number of charity trustees would not as a result be exceeded;</p> <p>(e) A person so appointed by the members of the CIO shall retire in accordance with the provisions of sub-clauses (a) and (b) of this clause. A person so appointed by the charity trustees shall retire at the conclusion of the annual general meeting next following the date of his appointment, and shall not be counted for the purpose of determining which of the charity trustees is to retire by rotation at that meeting.</p> <p>13.2 Nominated Charity Trustees</p> <p>(a) Bradley Stoke Community School, Bradley Stoke Youth Football Club, North Bristol Rugby Football Club and Stoke Lane Football Club (each an “Appointing Body” and together, the “Appointing Bodies”) may each appoint one (1) charity trustee.</p> <p>(b) Any appointment must be made at a meeting held according to the ordinary practice of the appointing body.</p> <p>(c) Each appointment must be for a term of three (3) years.</p> <p>(d) The appointment will be effective from the later of: (i) the date of the vacancy; or (ii) the date on which the CIO is informed of the appointment.</p> <p>(e) The person appointed need not be a member of the appointing body.</p> <p>(f) A trustee appointed by the appointing body has the same duty under Clause 12.1 as the other charity trustees to act in the way he or she decides in good faith would be most likely to further the purposes of the CIO.</p>
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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	NA
The charity's organisational structure and any wider network with which the charity works	Para 1.51	NA
Relationship with any related parties	Para 1.51	NA
Other		NA

Reference and Administrative details

Charity name	The Luke Wheaton Legacy Trust
Other name the charity uses	Luke's Legacy Trust
Registered charity number	1194925
Charity's principal address	Bradley Stoke Community School Fiddler's Wood Lane Bradley Stoke BS32 9BS

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	Jamie Wheaton	Chair		
2	Paula Miles	Treasurer		
3	Matt Wheaton			
4	Andy Young	Vice Chair		
5	Steve Moir			
6	Martin Randall			
7	Simon Bryant			
8	Jamie Mayes			
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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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		Unrestricted funds	Restricted funds	Endowment funds
	Details	to nearest £	to nearest £	to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset	Cost (optional)	Current value
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset	Cost (optional)	Current value
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which	Amount due	When due
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
		Jamie Wheaton	14/11/2024	



Report to the trustees

Charity Name
The Luke Wheaton Legacy Trust

On accounts for the year
ended

31st March 2024 Charity no
(if any) 1194925

Set out on pages

1,2,3
(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31/03/2024**

Responsibilities and basis
of report

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

Independent examiner's
statement

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

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did 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:

Date:

12/12/2024

Name:

Paul Richards

IER

Oct 2018

1

Relevant professional
qualification(s) or body (if
any):

N/A

Address:

15 convent Close

BS10 7XQ

Relevant professional qualification(s) or body (if any):

N/A

Address:

15 convent Close
BS10 7XQ



Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

[Empty box for disclosure details]

[Empty box for disclosure details]

THE LUKE WHEATON LEGACY TRUST

England & Wales - Charity number 1194925

Accounts



Trustees' Annual Report for the period

From 1st April 2022 To 31st March 2023

Charity name: The Luke Wheaton Legacy Trust

Charity registration number: 1194925

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>(a) To advance the vocational training and physical education of pupils at Bradley Stoke Community School and other Olympus Academy Trust schools, in particular but not exclusively by providing and assisting in the provision of financial or other assistance to: (i) recognise and reward vocational and/or sporting excellence;</p> <p>and/or</p> <p>(ii) enable such persons to prepare for entry into any occupation, trade or profession on leaving any educational establishment;</p> <p>(b) to advance in life and help young athletes in South Gloucestershire and surrounding areas who have need by reason of their youth, age, infirmity or disability, poverty or social and economic circumstances with a view to improving the conditions of life and advancing the education of such persons, in particular but not exclusively by providing grants and items to individuals in need and/or charities or other organisations working to support such persons;</p> <p>And</p> <p>(c) to advance in life and help young athletes in South Gloucestershire and surrounding areas, in particular but not exclusively by providing and assisting in the provision of financial or other assistance to recognise and reward sporting excellence.</p>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or	Para 1.17 and 1.19	<p>We continue to help young people excel both as individuals and through group sports and activities. Along side this we have put on our first apprenticeship</p>

services identified in the accounts.		open evening and have been promoting the benefits of apprenticeships.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	All trustees have been required to read and have regard to the guidance issued by the Charity Commission on public benefit before becoming a trustee.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	NA
Policy on social investment including program related investment	Para 1.38	NA
Contribution made by volunteers	Para 1.38	NA
Other		NA

Achievements and Performance

	SORP reference	
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.	Para 1.20	<p>We continued to support primary aged children with access to a skipping fitness programme, with all staff and children trained. Skipping resources are provided for schools and this will culminate in a fund raising event for all children in each school to raise sponsorship and through the year to develop and improve their fitness.</p> <p>The refurbishment and replacement of equipment in the Bradley Stoke Community School fitness suite (now named the Luke Wheaton Fitness Suite) which will benefit the teaching of fitness to all students in the school and will benefit</p> <p>the students having access to a well-equipped fitness suite as part of</p>

		<p>extra-curricular programmes.</p> <p>We have been supporting local sports clubs with funding to allow them to continue after covid. This means that young people can continue to have access to local sport and activities. We have also been helping young individuals progress with their athletics.</p> <p>The Trust has contributed towards the start up costs and promoted the benefits for a new local Park run which is open to ages 7 upwards and now takes place weekly.</p> <p>We continue to support and fund both girls football and rugby teams to allow more young people to have access to sport regardless of gender.</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	NA
Performance of fundraising activities against objectives set	Para 1.41	<p>We have held another annual fundraising event 'Luke's Event' along with raffles, and auctions. Local sports clubs have held memorial matches and individuals have raised money through sponsorship for events such as Ironman and walking challenges.</p> <p>We have beat our fundraising target by almost 5k this year.</p>
Investment performance against objectives	Para 1.41	NA
Other		NA

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	TBC
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	TBC
Amount of reserves held	Para 1.22	TBC
Reasons for holding zero reserves	Para 1.22	TBC
Details of fund materially in deficit	Para 1.24	TBC
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	TBC

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	Annual sports tournaments and family day at NBRFC. Other fundraising activities by individuals, clubs and donations from businesses.
Investment policy and objectives including any social investment policy adopted	Para 1.46	NA
A description of the principal risks facing the charity	Para 1.46	NA
Other		NA

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Trust deed
How is the charity constituted? (e.g unincorporated association , CIO)	Para 1.25	CIO
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	<p>Eligibility for trusteeship</p> <p>(a) Every charity trustee must be a natural person.</p> <p>(b) No one may be appointed as a charity trustee: (i) if he or she is under the age of 16 years; or (ii) if he or she would automatically cease to hold office under the provisions of clause 15.1(f).</p> <p>(c) No one is entitled to act as a charity trustee whether on</p> <p>appointment or on any re-appointment until he or she has</p> <p>expressly acknowledged, in whatever way the charity trustees decide, his or her acceptance of the office of charity trustee.</p> <p>(d) At least one of the trustees of the CIO must be 18 years of age or over. If there is no trustee aged at least 18 years, the remaining trustee or trustees may act only to call a meeting of the charity trustees, or appoint a new charity trustee.</p> <p>Elected charity trustees</p> <p>(a) Following the first annual general meeting of the members of the CIO, one-third of the elected charity trustees shall retire from office every three (3) years. If the number of elected charity trustees is not three or a multiple of three, then the number nearest to one-third shall retire from office, but if there is only one charity trustee, he or she shall retire;</p> <p>(b) The charity trustees to retire by rotation shall be those who have been longest in office since their last appointment or reappointment. If any trustees were last appointed or reappointed on the same day those to retire shall (unless they otherwise agree among themselves) be determined by lot;</p> <p>(c) The vacancies so arising may be filled by the decision of the members</p>

	<p>at the annual general meeting; any vacancies not filled at the annual general meeting may be filled as provided in sub-clause (d) of this clause;</p> <p>(d) The charity trustees may at any time decide to appoint a new charity trustee, whether in place of a charity trustee who has retired or been removed in accordance with clause 15 (Retirement and removal of charity trustees), or as an additional charity trustee, provided that the limit specified in clause 12.3 on the number of charity trustees would not as a result be exceeded;</p> <p>(e) A person so appointed by the members of the CIO shall retire in accordance with the provisions of sub-clauses (a) and (b) of this clause. A person so appointed by the charity trustees shall retire at the conclusion of the annual general meeting next following the date of his appointment, and shall not be counted for the purpose of determining which of the charity trustees is to retire by rotation at that meeting.</p> <p>13.2 Nominated Charity Trustees</p> <p>(a) Bradley Stoke Community School, Bradley Stoke Youth Football Club, North Bristol Rugby Football Club and Stoke Lane Football Club (each an “Appointing Body” and together, the “Appointing Bodies”) may each appoint one (1) charity trustee.</p> <p>(b) Any appointment must be made at a meeting held according to the ordinary practice of the appointing body.</p> <p>(c) Each appointment must be for a term of three (3) years.</p> <p>(d) The appointment will be effective from the later of: (i) the date of the vacancy; or (ii) the date on which the CIO is informed of the appointment.</p> <p>(e) The person appointed need not be a member of the appointing body.</p> <p>(f) A trustee appointed by the appointing body has the same duty under Clause 12.1 as the other charity trustees to act in the way he or she decides in good faith would be most likely to further the purposes of the CIO.</p>
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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	NA
The charity's organisational structure and any wider network with which the charity works	Para 1.51	NA
Relationship with any related parties	Para 1.51	NA
Other		NA

Reference and Administrative details

Charity name	The Luke Wheaton Legacy Trust
Other name the charity uses	Luke's Legacy Trust
Registered charity number	1194925
Charity's principal address	Bradley Stoke Community School Fiddler's Wood Lane Bradley Stoke BS32 9BS

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
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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

--


Other optional information

--

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)	Jamie Wheaton	
Position (eg Secretary, Chair, etc)	Chair	
Date	07/01/2024	



Receipts and pay

For the period
from

1/4/2022

Section A Receipts and payments

	Unrestricted to the nearest £	Restricted funds to the nearest £
A1 Receipts		
Donations, legacies and grants	7,245	-
Fundraising events	6,981	-
Interest on deposit account	-	-
Fees for charitable services	-	-
Activities for generating funds (trading)	591	-
	-	-
	-	-
	-	-
Sub total(Gross income for AR)	14,816	-
A2 Asset and investment sales, (see table).		
	-	-
	-	-
Sub total	-	-
Total receipts	14,816	-
A3 Payments		
Grants and donations paid	12,120	-
Bank interest and charges	30	-
Cost of fundraising events	901	-
Fundraising costs (trading activities)	221	-
Printing, postage, stationery and computer supplies	35	-
	-	-
	-	-
	-	-
	-	-
Sub total	13,307	-
A4 Asset and investment purchases, (see table)		
	-	-
	-	-
Sub total	-	-
Total payments	13,307	-
Net of receipts/(payments)	1,509	-
A5 Transfers between funds	-	-
A6 Cash funds last year end	-	-
Cash funds this year end	1,509	-

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

Categories

Details

B1 Cash funds

Total cash funds

(agree balances with receipts and payments account (s))

B2 Other monetary assets

Details

B3 Investment assets

Details


B4 Assets retained for the charity's own use

Details

B5 Liabilities

Details

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

Signature


	2	CC16a
ments accounts		
To	31/3/2023	



Endowment to the nearest £	Total funds to the nearest £	Last year to the nearest £
-	7,245	44,603
-	6,981	371
-	-	-
-	-	-
-	591	-
-	-	-
-	-	-
-	-	-
-	14,816	44,974
-	-	
-	-	-
-	-	-
-	14,816	44,974
-	12,120	4,426
-	30	69
-	901	-
-	221	-
-	35	-
-	-	-
-	-	-
-	-	-
-	-	-
-	13,307	4,495
-	-	
-	-	-
-	-	-
-	13,307	4,495
-	1,509	40,479
-	-	-
-	-	-
-	1,509	40,479

Unrestricted to nearest £	Restricted funds to nearest £	Endowment to nearest £
41,988	-	-
-	-	-
-	-	-
41,988	-	-
Agreement Error	OK	OK

Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-

Fund to which asset	Cost (optional)	Current value
	-	-
	-	-
	-	-
	-	-
	-	-

Fund to which asset	Cost (optional)	Current value
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-

Fund to which	Amount due	When due
	-	
	-	
	-	
	-	
	-	

Print Name	Date of approval
Jamie Wheaton	14/11/2023

THE LUKE WHEATON LEGACY TRUST

England & Wales - Charity number 1194925

Accounts



Trustees' Annual Report for the period

From 23rd June 2021 TO the 31st March 2022

Charity name: Luke Wheaton Legacy Trust

Charity registration number: 1194925

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>(a) To advance the vocational training and physical education of pupils at Bradley Stoke Community School and other Olympus Academy Trust schools, in particular but not exclusively by providing and assisting in the provision of financial or other assistance to: (i) recognise and reward vocational and/or sporting excellence; and/or (ii) enable such persons to prepare for entry into any occupation, trade or profession on leaving any educational establishment;</p> <p>(b) to advance in life and help young athletes in South Gloucestershire and surrounding areas who have need by reason of their youth, age, infirmity or disability, poverty or social and economic circumstances with a view to improving the conditions of life and advancing the education of such persons, in particular but not exclusively by providing grants and items to individuals in need and/or charities or other organisations working to support such persons; And</p> <p>(c) to advance in life and help young athletes in South Gloucestershire and surrounding areas, in particular but not exclusively by providing and assisting in the provision of financial or other assistance to recognise and reward sporting excellence.</p>
Summary of the main activities in relation to	Para 1.17 and 1.19	Fund raising events at Luke's rugby club, North Bristol RFC, charity bike

those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.		ride and car washes, donations from local businesses. Naming of school gym in Luke's name and plan for replacement and refurbishment, setting up, training and resourcing of fitness skipping project across all Olympus primary schools.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	All trustees have been required to read and have regard to the guidance issued by the Charity Commission on public benefit before becoming a trustee.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	NA
Policy on social investment including program related investment	Para 1.38	NA
Contribution made by volunteers	Para 1.38	NA
Other		NA

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>All primary aged children across the Olympus Academy trust will have access to a skipping fitness programme, with all staff and children trained. Skipping resources are provided for all schools and this will culminate in a fund raising event for all children in each school to raise sponsorship and through the year to develop and improve their fitness. Plan for refurbishment and replacement of equipment in the Bradley Stoke Community School fitness suite (now named the Luke Wheaton Fitness Suite) which will benefit the teaching of fitness to all students in the school and will benefit the students having access to a well-equipped fitness suite as part of extra-curricular programmes.</p>
--	------------------	---

Additional information (optional)

You may choose to include further statements where relevant about:

<p>Achievements against objectives set</p>	<p>Para 1.41</p>	<p>NA</p>
<p>Performance of fundraising activities against objectives set</p>	<p>Para 1.41</p>	<p>Fundraising car washes and football matches at Bradley Stoke Community School, annual fund raising family day at North Bristol Rugby Club, football tournament at Bradley Stoke Youth FC, donations from sponsorship from businesses. Raised over £4k in the first 9 months of being in existence. Target for the next twelve months is to raise £10k.</p>
<p>Investment performance against objectives</p>	<p>Para 1.41</p>	<p>NA</p>
<p>Other</p>		<p>NA</p>

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	TBC
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	TBC
Amount of reserves held	Para 1.22	TBC
Reasons for holding zero reserves	Para 1.22	TBC
Details of fund materially in deficit	Para 1.24	TBC
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	TBC

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	Annual sports tournaments and family day at NBRFC. Non-uniform day at BSCS. Other fundraising activities by individuals, clubs and businesses.
Investment policy and objectives including any social investment policy adopted	Para 1.46	NA
A description of the principal risks facing the charity	Para 1.46	NA
Other		NA

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Trust deed
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	<p>Eligibility for trusteeship</p> <p>(a) Every charity trustee must be a natural person.</p> <p>(b) No one may be appointed as a charity trustee: (i) if he or she is under the age of 16 years; or (ii) if he or she would automatically cease to hold office under the provisions of clause 15.1(f).</p> <p>(c) No one is entitled to act as a charity trustee whether on appointment or on any re-appointment until he or she has expressly acknowledged, in whatever way the charity trustees decide, his or her acceptance of the office of charity trustee.</p> <p>(d) At least one of the trustees of the CIO must be 18 years of age or over. If there is no trustee aged at least 18 years, the remaining trustee or trustees may act only to call a meeting of the charity trustees, or appoint a new charity trustee.</p> <p>Elected charity trustees</p> <p>(a) Following the first annual general meeting of the members of the CIO, one-third of the elected charity trustees shall retire from office every three (3) years. If the number of elected charity trustees is not three or a multiple of three, then the number nearest to one-third shall retire from office, but if there is only one charity trustee, he or she shall retire;</p> <p>(b) The charity trustees to retire by rotation shall be those who have been longest in office since their last appointment or reappointment. If any trustees were last appointed or reappointed on the same day those to retire shall (unless they otherwise agree among themselves) be determined by lot;</p> <p>(c) The vacancies so arising may be filled by the decision of the members</p>

		<p>at the annual general meeting; any vacancies not filled at the annual general meeting may be filled as provided in sub-clause (d) of this clause;</p> <p>(d) The charity trustees may at any time decide to appoint a new charity trustee, whether in place of a charity trustee who has retired or been removed in accordance with clause 15 (Retirement and removal of charity trustees), or as an additional charity trustee, provided that the limit specified in clause 12.3 on the number of charity trustees would not as a result be exceeded;</p> <p>(e) A person so appointed by the members of the CIO shall retire in accordance with the provisions of sub-clauses (a) and (b) of this clause. A person so appointed by the charity trustees shall retire at the conclusion of the annual general meeting next following the date of his appointment, and shall not be counted for the purpose of determining which of the charity trustees is to retire by rotation at that meeting.</p> <p>13.2 Nominated Charity Trustees</p> <p>(a) Bradley Stoke Community School, Bradley Stoke Youth Football Club, North Bristol Rugby Football Club and Stoke Lane Football Club (each an “Appointing Body” and together, the “Appointing Bodies”) may each appoint one (1) charity trustee.</p> <p>(b) Any appointment must be made at a meeting held according to the ordinary practice of the appointing body.</p> <p>(c) Each appointment must be for a term of three (3) years.</p> <p>(d) The appointment will be effective from the later of: (i) the date of the vacancy; or (ii) the date on which the CIO is informed of the appointment.</p> <p>(e) The person appointed need not be a member of the appointing body.</p> <p>(f) A trustee appointed by the appointing body has the same duty under Clause 12.1 as the other charity trustees to act in the way he or she decides in good faith would be most likely to further the purposes of the CIO.</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

		NA
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Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	NA
Relationship with any related parties	Para 1.51	NA
Other		NA

Reference and Administrative details

Charity name	Luke Wheaton Legacy Trust
Other name the charity uses	Luke's Legacy Trust
Registered charity number	1194925
Charity's principal address	Bradley Stoke Community School Fiddler's Wood Lane Bradley Stoke BS32 9BS

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	Steve Moir	Chair		
2	Paula Miles	Treasurer		
3	Matt Wheaton			
4	Jamie Wheaton	Vice chair		
5	Andy Southcott			
6	Andy Young			
7	Martin Randall			
8	Simon Bryant			
9	John Underhill			
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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)

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

--

Other optional information

--

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

S. Moir

Full name(s)

Steve Moir

Position (eg
Secretary, Chair, etc)

Chair

Date

29.6.22



CHARITY COMMISSION
FOR ENGLAND AND WALES

Luke Wheaton Legacy Trust

1

Receipts and payments accounts

CC16a

For the period from	06/23/2021	To	03/31/2022
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations, legacies and grants	44,603	-	-	44,603	-
Fundraising events	371	-	-	371	-
Interest on deposit account	-	-	-	-	-
Fees for charitable services	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	44,974	-	-	44,974	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	44,974	-	-	44,974	-
A3 Payments					
Costs of charitable activities	4,426	-	-	4,426	-
Bank interest and charges	69	-	-	69	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	4,495	-	-	4,495	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	4,495	-	-	4,495	-
Net of receipts/(payments)	40,479	-	-	40,479	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	40,479	-	-	40,479	-

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash in bank	40,479	-	-
		-	-	-
		-	-	-
	Total cash funds	40,479	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

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

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

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

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

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

Signature	Print Name	Date of approval

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03/31/2022	
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Restricted funds £ Endowment funds £ Total funds £

		0.01
		2500.00
		500.00
		20020.00
		2000.00
		0.01
		371.00
		939.72
		801.38
		1.00
		5820.00
		7955.72
		1135.75
		302.50
		484.39
		2142.50
		0.00
		0.00
		0.00
		0.00
		0.00
		0.00
0.00	0.00	44973.98

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ts

3/2021	To	03/31/2022
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Bank interest and charges			Total £
69.00			69.00
			4426.00
69.00	0.00	0.00	4495.00

			0.00
			0.00
0.00	0.00	0.00	0.00

69.00	0.00	0.00	4495.00
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Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
The Luke Wheaton Legacy Trust

**On accounts for the year
ended**

31/03/2022

**Charity no
(if any)**

1194925

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31/03/2022**

**Responsibilities and
basis of report**

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

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed 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 (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

** Please delete the words in the brackets if they do not apply.*

Signed:

Date:

29.06.2022

Name:

Alison Volkmer

**Relevant professional
qualification(s) or body
(if any):**

AAT, student with ACCA

Address:

228 Juniper Way

Bradley Stoke

BS32 0DR

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.