



CHARITY COMMISSION
FOR ENGLAND AND WALES

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</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; 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	
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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	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.
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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	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.
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. 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)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)



Full name(s)

Steve Moir

Position (eg
Secretary, Chair, etc)

Chair

Date

29.6.22



CHARITY COMMISSION
FOR ENGLAND AND WALES

Luke Wheaton Legacy Trust

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Receipts and payments accounts

CC16a

For the period
from

06/23/2021

To

03/31/2022

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
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	

Luke Wheaton Legacy Trust

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For the period	From
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Receipts

		Donations, legacies and grants
Date	Receipts	
09/03/2021	Paypal	0.01
09/06/2021	Trufflesuffle	2500.00
09/14/2021	Barratt Development	500.00
09/17/2021	Quartet community	20020.00
09/20/2021	Plant-Ex Ingredients	2000.00
10/08/2021	Paula Warren	0.01
10/08/2021	Baileys Court Non Uniform Day	
10/21/2021	PPWDL4TK22223K7	939.72
10/27/2021	Inc. Luke Wheaton	801.38
10/29/2021	Andy Young	1.00
11/02/2021	Andy Young Just Giving	5820.00
11/10/2021	Luke's even nbrf	7955.72
11/25/2021	PPWDL4TK22223UF	1135.75
12/08/2021	PPWDL4TK2222435U	302.50
01/12/2022	ALDERWICK-CURRNT DONS STEPHEN SMA	484.39
03/01/2022	PPWDL4TK22224ZKK	2142.50
Sub total (Gross income for AR)		44602.98

06/23/2021	To
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[illegible]

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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

Luke Wheaton Legacy Trust

Paymen

For the period from	
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06/2

Payments

Date	Purchases £	Costs of charitable activities
08/18/2021	Card set up fee	
03/15/2022	Dan the skipping man	4426.00
Sub total		4426.00

Date	Asset and investment purchases	
Sub total		0.00

Total payments	4426.00
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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.