



CHARITY COMMISSION
FOR ENGLAND AND WALES

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"> 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.
--	--	--

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</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>
--	--	---

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			
	9				
	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

--

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



**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 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.