



**YELLOW WOOD FOUNDATION
TRUSTEES' REPORT AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 30 JUNE 2025**



PJE Chartered Accountants
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**Yellow Wood Foundation
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Yellow Wood Foundation
Trustees' Report For The Year Ended 30 June 2025

The trustees present their report and the financial statements for the year ended 30 June 2025.

Objectives and Activities

Aims and Objectives

The objective of the CIO is the advancement of such objects or purposes which are exclusively charitable according to the law of England and Wales in any part of the world and in such manner as the Trustees may in their absolute discretion think fit.

The Yellow Wood Foundation Trustees review the aims, objectives and activities of the charity each year. The Yellow Wood Foundation charity regularly reviews the success of key activities and the benefits the charity has brought to those groups of people that it is set up to help. These reviews also help the Yellow Wood Foundation Trustees ensure the charity's aims, objectives and activities remained focused on its stated purposes. This report reflects on what the charity has achieved and the outcomes of its work in the reporting period.

The trustees have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives and in planning its future activities. In particular, the trustees consider how planned activities will contribute to the aims and objectives that have been set.

Public Benefit

Yellow Wood Foundation ("YWF") delivers public benefit by strategically providing financial support to other registered charities working directly to improve lives, charitable causes and families facing hardship. Our approach is to identify and support organisations that demonstrate a clear commitment to delivering tangible benefits to the public.

The Trustees undertake a thorough assessment of potential recipient charities, considering their charitable objectives, track record, governance, and the potential impact of YWF's donation on the public benefit they provide. This ensures that our funding is directed effectively and contributes to meaningful outcomes for the wider community.

The trustees confirm that they have complied with the requirements of Section 17 of the Charities Act 2011 to have due regard to the Charity Commission's guidance on public benefit.

Grantmaking

(i) Yellow Wood Foundation is governed by a CIO Foundation constitution. The constitution allows the Trustees to use the whole or any part of the fund (income or capital) for such legally charitable purposes as the Trustees in their absolute discretion think fit.

(ii) Yellow Wood Foundation has no Permanent Endowment (funds that legally must be retained) or Restricted Funds (funds that must be applied for a specific purpose).

(iii) The Trustees will have due regard to the provisions of the Charities Act 2011 and the Guidance publications of the Charity Commission.

(iv) The current strategy is for the Foundation capital to be invested to generate income which will be distributed as grants. The size of these is at the absolute discretion of the Trustees and applications will be considered case by case.

(v) The impact of grants will be monitored by the trustees through reports provided by those organisations in receipt of grants.

(vi) Applications for grants must be made in writing and information must be provided by applicants in the form agreed by the Trustees from time to time. Grants will be approved by the Trustees, quorum of two.

(vii) In carrying out their duties, the Trustees are aware of the need to identify, disclose and manage any conflicts of interest.

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**Yellow Wood Foundation
Trustees' Report (continued)
For The Year Ended 30 June 2025**

Grantmaking - continued

(viii) Yellow Wood Foundation can be wound-up by resolution of the Members. In this case the remaining capital will be distributed to one or more registered UK charities judged by the Trustees to be well placed to use the endowment in line with the Objects of the YWF.

Achievements and Performance

Main Achievements

Charitable Activity

All charitable activity continued to take the form of grants and the priorities of the trustees have remained the support of small to medium sized charities and charitable projects based in Bristol and surrounding areas. As a trustee board we have continued to feel the value of having first hand contact with the projects we fund, sometimes attending events, visiting charities and having ongoing conversations around needs. This allows us to make grants in an informed and engaged way and helps us to work with charities that will deliver a powerfully positive social or personal impact in their area, and for this reason we have a focus on Bristol and surrounds. We continue to have regard to the size and funding shape of charities we support, and normally prioritise those which are not in receipt of significant government or local authority funding. We have also continued to prioritise human charities and have not made grants to animal charities.

The current funding priorities of the trustees are kept updated on our website, yellowwood.org.uk, where the application and reporting forms can also be found.

The charities to which we made grants in this reporting period are listed below, together with some excerpts from the reports they provided.

Travelling Light Theatre Company

£3,000 to support the delivery of workshops to create lanterns for the community Winter Lights Event in January 2025.

From the Travelling Light report:

“Five workshops to create lanterns were held in Barton Hill during December and January including at the Little Library at the Wellspring Settlement, Barton Hill Activity Club, St Luke’s Lunch After School Club and Barton Hill Academy Primary School. These workshops were followed up with reminders sent to families to encourage participation in the lantern parade, and Winter Lights event. There was also a workshop at the Winter Lights event.

Children and families were invited to participate in the lantern parade which was the finale of the Winter Lights event – departing from the Wellspring Settlement and travelling to the Urban Park, accompanied by the Jump Street Band, via local streets.

Over 100 children and their families took part in the lantern parade, and nearly 700 attended the Winter Lights event.

All our activity was targeted at families in the local area of Barton Hill which is in the Lawrence Hill ward where 54% of children live in poverty. Families who attended the workshops, and those who attended the Winter Lights event, were mostly from the local area and overwhelmingly said how the event brought the community together for something joyful during a difficult time.

The grant enabled us to generate match funding from Bristol City Council for the Lantern Parade and ongoing work with the community. We hope to contribute to an event in Barton Hill later in the year with community partners to promote community cohesion.”

The trustees attended the Winter Lights event and it was a pleasure to see first hand the sense of joy and cohesion around the bustling and very well attended event. Clearly the whole project had been a great success and the funding for the workshops had made a contribution towards enabling that delivery.

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**Yellow Wood Foundation
Trustees' Report (continued)
For The Year Ended 30 June 2025**

Main Achievements - continued

Bristol Children's Scrap Store Play Rangers Projects

£10,000 to support the delivery of after-school and holiday clubs, offering provision for families and children in some of the more deprived areas of Bristol.

The grant amounted to roughly a tenth of the total budget and was a larger single grant than we normally make, but in making it the trustees were mindful of the wide geographical reach, and number of participants directly engaged in the sessions.

From the Children's Scrapstore report:

"Children's Scrapstore has delivered 176 play ranger sessions across the year. These sessions attracted 967 children with a total of 3,483 attendances across Lawrence Weston, Avonmouth, Sea Mills, Horfield and Frome Vale. In total 936 meals were provided across the 11 weeks of holidays sessions throughout the year.

Our sessions run after school (3.30 – 5.30pm) in term time as well as during the school holidays. The school holiday sessions offer food, shorter half terms are 2 hours long with cold food and the Easter and summer holidays are 4 hours, with hot food. This is determined by the funding we apply for/are successful with.

Our core sites are Lawrence Weston and Frome Vale where we have a long standing group of returning children and young people, showing the importance of consistency and sustainability of our offer.

We also offer development work, supporting new play sessions to start and establish before handing them over to another organisation. We supported Oasis Hub North and Avonmouth Community Centre to get a play session up and running in 2024 as well as The Ardagh Community Trust in Horfield. We are now doing the same in Sea Mills for the Sea Mills Community Initiative which started early March 2025.

The play ranger sessions facilitate more play in the community, getting children playing freely outside – children often feel more confident to play out with friendly adults around. We keep core staff the same at each site to ensure relationships and trust can build for consistency."

St Agnes Adventure Playground

£6,000 towards the purchase of public liability insurance and the costs of reopening the playground after a period of inactivity and ensuing disrepair.

The CIC was also in need of a new board who have now been appointed and the money successfully spent on the relaunch in 2025. Given the difficulties associated with a relaunch of a large adventure playground, from governance to equipment and safety, there was inevitably some risk attached to this grant and it is encouraging to hear that it has been a success so far and the grant has helped to generate other funding in turn. We had more detailed contact with this organisation than is normal for us in order to mitigate those risks before making the grant.

From the St Agnes Adventure Playground report:

"Spring break was the relaunch. Without Yellow Wood's Grant it would have not been possible to have provided play sessions such as Bird Feeder making, Gardening workshop, Clay pot making, Plant Pot Decorating and Cooking workshops, Easter Hat making, Easter card making and designing personal Easter Eggs.

Our evaluation was 89% which allowed us to apply for Summer Holiday provision which started on the 24 July 2025 consisting of Giant Games play sessions, Cooking Workshop (in Partnership - 91 ways). Creating own T-Shirt Design, weaving Yarn workshop, Glass/cup painting workshop, Balloon painting and creating portrait for our playground.

Children are always offered free play sessions. Multi sports activities include football, basketball and cricket, tennis and skipping.

The children love to roller skate and cycle.

Since we received your grant we have introduced Karate and self defence sessions and mindfulness wellness activities.

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**Yellow Wood Foundation
Trustees' Report (continued)
For The Year Ended 30 June 2025**

Main Achievements - continued

Young Enterprise, public Service sessions: children like to Question and get answers during sessions.
We offer all children a hot meal (free) every session which we cook from scratch at the play ground.

We are desperate to update our facilities (ie two bathrooms) which is in immediate need of refurb and we are keen to install new lighting for the football pitch which we just extended after consultation with our teens.”

Financial Review

Financial Position

Total incoming resources for the year amounted to £7,358, representing a decrease from £14,709 in the previous year. This growth was primarily driven by a decrease in investment income, which reduced from £14,706 in 2024 to £7,331 in the current year. The trustees remain satisfied with the level of income generated during the year, which has allowed the Charity to continue its charitable objectives.

Total resources expended during the year amounted to £20,672, a decrease compared to £21,516 in the year ended 30 June 2024. This decrease is primarily attributable to a reduction in the costs of raising funds.

Investment management costs relating to portfolio management also saw an decrease, from £1,886 to £1,007. This was due to an overstatement in the year to June 2024 but now corrected in June 2025.

The Charity experienced gains on investments of £26,114 during the year ended 30 June 2025. £24,585 of the gains represent unrealised fair value revaluation gains and £1,529 were realised gains generated upon disposals made during the year. This positive investment performance has positively impacted the overall financial position of the Charity.

Overall, the Charity achieved a net income of £12,800 for the year ended 30 June 2025, a reduction compared to the previous years £33,852. This years net income has led to an increase in the Charity's total funds (all of which are unrestricted) from £510,832 at 30 June 2024 to £523,632 at 30 June 2025. This strengthening of the Charity's financial base will provide greater capacity for future charitable activities.

The Statement of Financial Position shows that the charity's principal asset is its investments, which increased from £495,475 in 2024 to £507,957 in 2025, reflecting the positive investment gains. The Charity also holds a healthy level of cash at bank of £17,220 (2024: £16,850), providing sufficient liquidity for its immediate needs.

The total net assets of the charity at 30 June 2025 are £523,632, all of which are unrestricted funds. The trustees consider this level of reserves to be appropriate to enable the Charity to meet its ongoing charitable objectives and to provide a degree of financial stability for future activities. The trustees will continue to review the Charity's reserves policy to ensure it remains adequate in light of the Charity's strategic plans and potential future risks.

Reserves Policy

The charity's current investment policy is to invest the capital belonging to the charity and distribute income as grants. The trustees monitor the value of the capital investment at each meeting of the board. The charity has no employees or costs other than professional fees of accountancy and investment management. There is no foreseeable scenario in which the capital investment value would be insufficient to meet these obligations so the trustees do not have a defined reserves policy.

As at 30 June 2025, the Charity's unrestricted reserves stood at £523,632 (2024: £510,832). The Trustees consider this level to be above the target level.

The Trustees believe that maintaining reserves at this level will provide sufficient financial resilience to ensure the continuity of the Charity's activities and enable it to respond to unforeseen circumstances.

No restricted funds were held by the charity in the year.

**Yellow Wood Foundation
Trustees' Report (continued)
For The Year Ended 30 June 2025**

Going Concern

The Trustees have assessed the Charity's ability to continue as a going concern and have a reasonable expectation that the Charity has adequate resources to continue its operational activities for the foreseeable future. For this purpose, the foreseeable future is considered to be a period of at least one year from the date of approval of these financial statements.

The Trustees have considered the Charity's current financial position, its key risks and uncertainties, and future plans. Based on this assessment, there are no material uncertainties related to events or conditions that may cast significant doubt about the Charity's ability to continue as a going concern.

Investment Policy

(i) Investment decisions will be taken by the Trustees, quorum of two. It is considered necessary to appoint an investment manager to invest the funds according to the strategic aims of the Trustees. The Foundation was set up with financial assets valued in the region of £530,000 all invested in SVS Heritage Balanced Portfolio fund.

(ii) The overall investment objective is to generate an above average net annual income (the current target is 3.5%) and (at least) preservation of capital in real terms.

(iii) Income from individual investments is expected quarterly or half-yearly to enable the Trustees to distribute grants biannually.

(iv) The Trustees recognise that investment involves risks and they intend to mitigate these by: spreading risk between investments (eg to achieve a geographical and sectoral spread) spreading risk within investments (eg by using pooled funds) having regard to liquidity (the timescale within which the investments can be sold) using sterling as the base currency of the investment portfolio (but it is recognised that underlying investments may have currency exposure and thus currency risk) no more than one third of the investment portfolio being represented by any one individual investment The Trustees regard their overall risk appetite as medium.

(v) Uninvested funds (including income held pending grant distribution or funds pending re investment) are to be held in an interest-bearing deposit account.

(vi) Regarding any Restrictions and Ethical Screening of investments, the Trustees do not wish to adopt an exclusionary policy, but individual investments may be excluded for any reason.

(vii) Reports from individual investments will be reviewed as they become available, quarterly or half-yearly. The overall investment portfolio will be reviewed annually and this will include a review of performance, risk profile and compatibility with the Trust's objectives.

Structure, Governance and Management

Trustee Selection Methods

Apart from the first charity trustees, every charity trustee must be appointed by resolution of the members.

In selecting the individuals for appointment as charity trustees, the members must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.

Trustee Changes

There have been no changes to the board of trustees during this reporting period.

**Yellow Wood Foundation
Trustees' Report (continued)
For The Year Ended 30 June 2025**

Reference and Administrative Details

Trustees

T A Biddle - Chair
E C Biddle
L Glenn

Charity Number

1196057

Principal Address

12 Backwell Common
Backwell
BS48 3AD

Accountants

PJE Chartered Accountants
2 Oakfield Road
Clifton
Bristol
BS8 2AL

Investment Advisors

Heritage Capital Management
Broadway House
Tothill Street
London
SW1H 9NQ

**Yellow Wood Foundation
Trustees' Report (continued)
For The Year Ended 30 June 2025**

The trustees' report was approved by the board of trustees and signed on its behalf by:



T A Biddle

Trustee

Date

29 Apr 2026

**Yellow Wood Foundation
Accountants' Report
For The Year Ended 30 June 2025**

Accountant's report to the board of trustees on the preparation of the unaudited statutory accounts of Yellow Wood Foundation for the year ended 30 June 2025.

In order to assist you to fulfil your duties under the Charities Act 2011, we have prepared for your approval the financial statements of Yellow Wood Foundation for the year ended 30 June 2025 which comprise the Statement of Financial Activities (including Income and Expenditure Account), Statement of Financial Position and the related notes from the charity's accounting records and from information and explanations which you have provided us with.

This report is made solely to the board of trustees of the charity, as a body, in accordance with our letter of engagement dated . Our work has been undertaken solely to prepare for your approval the financial statements of Yellow Wood Foundation , and state those matters that we have agreed to state to the board of trustees of the charity, as a body, in this report. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than Yellow Wood Foundation and its board of trustees, as a body, for our work or for this report.

It is your duty to ensure that Yellow Wood Foundation has kept sufficient accounting records and to prepare statutory financial statements that give a true and fair view of the assets, liabilities, financial position and surplus or deficit of the charity. You consider that Yellow Wood Foundation is exempt from the requirement to have a statutory audit or an independent examination for the year ended 30 June 2025.

We have not been instructed to carry out an audit of the financial statements. For this reason, we have not verified the accuracy or completeness of the accounting records or information and explanations you have given to us and we do not, therefore, express any opinion on the financial statements.

PJ Evans

Philipa BSc FCA

Date 29 Apr 2026

PJE Chartered Accountants
2 Oakfield Road
Clifton
Bristol
BS8 2AL

Yellow Wood Foundation
Statement of Financial Activities
For The Year Ended 30 June 2025

		2025	2024
		Unrestricted funds	Unrestricted funds
	Notes	£	£
INCOME AND ENDOWMENTS FROM:			
Investments	3	7,358	14,709
EXPENDITURE ON:			
Raising funds	4	(1,007)	(1,886)
Charitable activities:	4		
Grants		(19,000)	(19,000)
Other		(665)	(630)
		(20,672)	(21,516)
NET EXPENDITURE BEFORE INVESTMENT LOSSES		(13,314)	(6,807)
Net gains on investments		26,114	40,659
NET EXPENDITURE		12,800	33,852
NET MOVEMENT IN FUNDS		12,800	33,852
RECONCILIATION OF FUNDS:			
Total funds brought forward		510,832	476,980
TOTAL FUNDS CARRIED FORWARD	10	523,632	510,832

The notes on pages 11 to 14 form part of these financial statements.

Yellow Wood Foundation
Statement of Financial Position
As At 30 June 2025

		2025	2024
		Unrestricted	Total
		funds	funds
	Notes	£	£
FIXED ASSETS			
Investments	8	507,957	495,475
		<u>507,957</u>	<u>495,475</u>
CURRENT ASSETS			
Cash at bank and in hand		17,220	16,850
		<u>17,220</u>	<u>16,850</u>
Creditors: Amounts Falling Due Within One Year	9	(1,545)	(1,493)
		<u>(1,545)</u>	<u>(1,493)</u>
NET CURRENT ASSETS (LIABILITIES)		15,675	15,357
		<u>15,675</u>	<u>15,357</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		523,632	510,832
		<u>523,632</u>	<u>510,832</u>
NET ASSETS		523,632	510,832
		<u>523,632</u>	<u>510,832</u>
FUNDS OF THE CHARITY			
Unrestricted Funds		523,632	510,832
		<u>523,632</u>	<u>510,832</u>
TOTAL FUNDS	10	523,632	510,832
		<u>523,632</u>	<u>510,832</u>

On behalf of the board



T A Biddle

Trustee

ie

29 Apr 2026

The notes on pages 11 to 14 form part of these financial statements.

Yellow Wood Foundation
Notes to the Financial Statements
For The Year Ended 30 June 2025

1. General Information

Yellow Wood Foundation is a charitable incorporated organisation registered with the Charity Commission, registered charity number 1196057. The principal address is 12 Backwell Common, Backwell, BS48 3AD.

2. Accounting Policies

2.1. Basis of Preparation of Financial Statements

The financial statements have been prepared in accordance with the Charities SORP (FRS 102) "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)", Financial Reporting Standard 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" and the Charities Act 2011.

The charity is a Public Benefit Entity as defined by FRS 102.

2.2. Fund Accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds are to be used for specific purposes as laid down by the donor.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

2.3. Incoming Resources

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

2.4. Resources Expended

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably.

Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Grants offered subject to conditions which have not been met at the year end date are noted as a commitment but not accrued as expenditure.

2.5. Investments

2.6. Cash and Cash Equivalents

Cash and cash equivalents are basic financial assets and include cash in hand and deposits held at call with banks, other short-term highly liquid investments that mature in no more than three months from the date of acquisition and are readily convertible to a known amount of cash with insignificant risk of change in value, and bank overdrafts.

2.7. Taxation

The charity is exempt from tax as all its income is charitable and applied for charitable purposes.

3. Investment Income

Yellow Wood Foundation
Notes to the Financial Statements (continued)
For The Year Ended 30 June 2025

	2025	2024
	Unrestricted funds	Unrestricted funds
	£	£
Interest from investments	27	3
Dividends from investments	7,331	14,706
	<u>7,358</u>	<u>14,709</u>

4. Analysis of Expenditure

	2025			
	Activities undertaken directly	Grant funding of activities (see note 5)	Support costs (see note 6)	Total
	£	£	£	£
Raising funds	1,007	-	-	1,007
Grants	-	19,000	-	19,000
Other	-	-	665	665
	<u>1,007</u>	<u>19,000</u>	<u>665</u>	<u>20,672</u>

	2024			
	Activities undertaken directly	Grant funding of activities (see note 5)	Support costs (see note 6)	Total
	£	£	£	£
Raising funds	1,886	-	-	1,886
Grants	-	19,000	-	19,000
Other	-	-	630	630
	<u>1,886</u>	<u>19,000</u>	<u>630</u>	<u>21,516</u>

5. Grants Payable

	2025	2024
	Grants to Institutions	Grants to Institutions
	£	£
Grants	<u>19,000</u>	<u>19,000</u>

Yellow Wood Foundation
Notes to the Financial Statements (continued)
For The Year Ended 30 June 2025

6. Support Costs

	2025
	Other
	£
General administration	665
	<u><u>665</u></u>
	2024
	Other
	£
General administration	630
	<u><u>630</u></u>

7. Average Number of Employees

Average number of employees during the year was: NIL (2024: NIL)

8. Investments

	Listed
	£
Cost or Valuation	
As at 1 July 2024	495,475
Additions	537
Disposals	(19,971)
Revaluations	31,916
As at 30 June 2025	<u><u>507,957</u></u>
Provision	
As at 1 July 2024	-
As at 30 June 2025	<u><u>-</u></u>
Net Book Value	
As at 30 June 2025	<u><u>507,957</u></u>
As at 1 July 2024	<u><u>495,475</u></u>

The investment fund is managed by Heritage Capital Management.

All funds are held in the SVS Heritage Balanced Portfolio Fund. The fund invests in equities and other listed securities, eligible collective investment schemes, investment trusts & companies including Real Estate Investment Trusts, fixed interest securities including government, corporate and convertible bonds, money market instruments and cash or near cash instruments. There are no geographical restrictions on the countries of investment.

Yellow Wood Foundation
Notes to the Financial Statements (continued)
For The Year Ended 30 June 2025

9. Creditors: Amounts Falling Due Within One Year

	2025	2024
	£	£
Other creditors	500	500
Accruals and deferred income	1,045	993
	<u>1,545</u>	<u>1,493</u>

10. Movement in Funds

	As at 1 July 2024	Income	Expenditure	As at 30 June 2025
	£	£	£	£
Unrestricted funds				
General:				
General unrestricted fund	510,832	7,358	5,442	523,632
Total funds	<u>510,832</u>	<u>7,358</u>	<u>5,442</u>	<u>523,632</u>

	As at 1 July 2023	Income	Expenditure	As at 30 June 2024
	£	£	£	£
Unrestricted funds				
General:				
General unrestricted fund	476,980	14,709	19,143	510,832
Total funds	<u>476,980</u>	<u>14,709</u>	<u>19,143</u>	<u>510,832</u>

11. Transactions with Trustees

None of the trustees received any remuneration or any other benefits from an employment with the charity or a related entity during the current or previous year.

No trustee expenses have been incurred.

12. Related Party Disclosures

There were no related party transactions for the year ended 30 June 2025.



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Parties involved with this document

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Wed, 29th Apr 2026 15:12:20 BST	David Lake - Copied In (61ffa299203d73d0187649ddebe24106)

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