



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day	Month	Year		Day	Month	Year
	01	04	2024		31	03	2025

Section A

Reference and administration details

Charity name

Mindset Vitality

Other names charity is known by

Registered charity number (if any) 1198750

Charity's principal address

4 St Mary's Rd, Ynysmeudwy

Pontardawe

Neath Port Talbot

Postcode

SA8 4QH

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	Fiona Macloed			
2	Sian Jackson			
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14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document
(eg. trust deed, constitution)

Constitution

How the charity is constituted
(eg. trust, association, company)

CIO

Trustee selection methods
(eg. appointed by, elected by)

Appointed by founder/director/volunteer

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

The relief of bereaved people in South Wales by providing emotional support, counselling and psychoeducation.

Promoting, setting up, and hosting a Bereavement Friendship Group in Pontardawe, Neath, and Swansea. Recruiting volunteers to co-host the group and help with developing our social media. Building networks with potential referrers.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

A new Bereavement Friendship group was started in Swansea, in St Mary's Minister in the town centre. It has now been running for over a year.

The Pontardawe group moved to a more comfortable and cheaper location in the Wellbeing Hub.

Section E Financial review

Brief statement of the charity's policy on reserves

We keep enough money to finance our 3 groups for 12 weeks (6 monts).

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Our source of funds is from grants that are used to run the groups without requiring any payment from attendees.



We received a bursary from Swansea University to pay an intern to gain experience with our charity.

Section F Other optional information

Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Fiona Macleod	Sian Jackson
Position (eg Secretary, Chair, etc)	Chair	Trustee
Date	31.01.2026	



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
Mindset Vitality

No (if any)

Receipts and payments accounts

CC16a

For the period
from

Period start date
01.04.2024

To

Period end date
31.03.2025

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Bursary from Swansea University	-	2,520	-	2,520	-
Grants & Donations	3,443	-	-	3,443	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	3,443	2,520	-	5,963	8,364
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	3,443	2,520	-	5,963	8,364
A3 Payments					
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	7,577	-	-	5,440	16,418
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	7,577	-	-	5,440	16,418
Net of receipts/(payments)	3,443	2,520	-	523	8,054
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	8,054	-
Cash funds this year end	3,443	2,520	-	8,574	8,054

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		-	-	-
		-	-	-
		-	-	-
	Total cash funds	8,574	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	Agreement Error	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	Details	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
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
	#VALUE!	Fiona Macloed	31.01.2026	
	#VALUE!	Sian Jackson	31.01.2026	