

# THE JULIE DAVIES FOUNDATION

England & Wales · Charity number 1199447

## Details

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**Status** Registered

**Legal form** CIO

**Registered** 2022-06-24

**Register** [View on the Charity Commission register](#)

## Contact

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**Address** 53 Iron Way  
Tondu  
Bridgend  
CF32 9BF

**Phone** 07793777632

**Email** [carlwaters65@gmail.com](mailto:carlwaters65@gmail.com)

## Activities

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**Objects:** THE OBJECT OF THE CIO IS: FOR THE PUBLIC BENEFIT TO RELIEVE THE NEEDS OF AND PRESERVE AND PROTECT GOOD HEALTH AND WELLBEING AMONGST PEOPLE WITH CANCER AND HEART DISEASE AND THEIR FAMILIES RESIDENT IN BRIDGEND COUNTY AND THE SURROUNDING AREA THROUGH THE AWARD OF GRANTS TO ASSIST IN THE PROVISION OF NECESSARY ITEMS, EQUIPMENT, SERVICES, COMFORTS, OUTINGS AND EXPERIENCES FOR SUCH PEOPLE.

**Activities:** The charity provides financial support for children and young people and their families who are suffering from terminal illnesses and need additional support which cannot be provided by the state.

## Classification

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- **How:** Makes Grants To Individuals, Makes Grants To Organisations
- **What:** General Charitable Purposes, Disability, The Prevention Or Relief Of Poverty
- **Who:** Children/young People

## Geography

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- **Area of benefit:** LOCAL
- Bridgend
- City Of Swansea
- Neath Port Talbot

## Finances

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| Period end | Income  | Expenditure | Assets | Employees |
|------------|---------|-------------|--------|-----------|
| 2024-08-31 | £11,132 | £1,594      | -      | -         |
| 2023-08-31 | £11,931 | £2,012      | -      | -         |

## Trustees

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| Name                      | Role  | Appointed  |
|---------------------------|-------|------------|
| <b>Nicola Jane Thomas</b> | Chair | 2023-03-01 |
| Carl Waters               |       | 2022-06-24 |
| Charlotte Helen Davies    |       | 2025-04-02 |
| Emily Jane Blackledge     |       | 2025-04-02 |
| Jason Thomas              |       | 2023-03-01 |
| Jodie Louise Stimson      |       | 2023-03-01 |

**THE JULIE DAVIES FOUNDATION**

England & Wales - Charity number 1199447

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# Accounts

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# Trustees' Annual Report for the period

|      |                   |    |      |    |                 |    |      |
|------|-------------------|----|------|----|-----------------|----|------|
| From | Period start date |    |      | To | Period end date |    |      |
|      | 01                | 09 | 2023 |    | 31              | 08 | 2024 |

## Section A Reference and administration details

Charity name

The Julie Davies Foundation

Other names charity is known by

Registered charity number (if any)

1199447

Charity's principal address

53 Iron Way

Tondu

Bridgend

Postcode

CF32 9BF

### 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  | Carl waters        |                 |                                   |   |
| 2  | Nicola Jane Thomas | Chair           |                                   |   |
| 3  | Deborah Coughlin   |                 |                                   |   |
| 4  | Jason Thomas       | Treasurer       |                                   |   |
| 5  | Jodie Louise Finn  |                 |                                   |   |
| 6  |                    |                 |                                   |   |
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| 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<br>(eg. trust deed, constitution)        | Constitution          |
| How the charity is constituted<br>(eg. trust, association, company) | trust                 |
| Trustee selection methods<br>(eg. appointed by, elected by)         | Appointed by trustees |

**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.

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**Section C Objectives and activities**

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

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|--|
| The charity provides financial support for children and young people and their families who are suffering from terminal illnesses and need additional support which cannot be provided by the state. |
|--|

During the period the charity has raised funds through a number of activities and has made a small number of donations in line with the objectives of the charity.

All grants made, were made after full consultation of the trustees and there no payments made to related parties, and were paid in line with guidance issued by the Charity Commission on public benefit.

**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**

The Charity has built upon its first year and has initiated a communication exercise to promote its activities.

A number of donations have been to individuals following discussion and approval of the Trustees.

## Section E Financial review

**Brief statement of the charity's policy on reserves**

At the 31<sup>st</sup> August 2024 the charity held cash reserves of £19457

**Details of any funds materially in deficit**

none

### 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.

## 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**

|  |             |  |
|--|-------------|--|
| <b>Signature(s)</b>                        | Carl Waters |  |
| <b>Full name(s)</b>                        | Carl Waters |  |
| <b>Position (eg Secretary, Chair, etc)</b> | Trustee     |  |
| <b>Date</b>                                | 24/6/25     |  |

**THE JULIE DAVIES FOUNDATION**

England & Wales - Charity number 1199447

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# Accounts

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# Trustees' Annual Report for the period

|             |                   |    |      |           |                 |    |      |
|-------------|-------------------|----|------|-----------|-----------------|----|------|
| <b>From</b> | Period start date |    |      | <b>To</b> | Period end date |    |      |
|             | 01                | 09 | 2022 |           | 31              | 08 | 2023 |

## Section A Reference and administration details

**Charity name** The Julie Davies Foundation

**Other names charity is known by** [ ]

**Registered charity number (if any)** 1199447

**Charity's principal address**

53 Iron Way

Tondu

Bridgend

**Postcode** CF32 9BF

### 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  | Carl waters        |                 |                                   |   |
| 2  | Nicola Jane Thomas | Chair           |                                   |   |
| 3  | Deborah Coughlin   |                 |                                   |   |
| 4  | Jason Thomas       | Treasurer       |                                   |   |
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| 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

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|---|-----------------------|
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| Trustee selection methods<br>(eg. appointed by, elected by)         | Appointed by trustees |

### Additional governance issues (Optional information)

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- relationship with any related parties;
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## Section C Objectives and activities

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

The charity provides financial support for children and young people and their families who are suffering from terminal illnesses and need additional support which cannot be provided by the state.

During the period the charity has raised funds through a number of activities and has made a small number of donations in line with the objectives of the charity.

All grants made, were made after full consultation of the trustees and there no payments made to related parties, and were paid in line with guidance issued by the Charity Commission on public benefit.

**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**

The main achievement during the period was the foundation and establishment of the Charity.

Initial fund raising events were held and the first grants made in line with the objectives of the charity.

**Section E****Financial review****Brief statement of the charity's policy on reserves**At the 31<sup>st</sup> August the charity held cash reserves of £9918**Details of any funds materially in deficit**

none

**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.

**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

|  |             |  |
|--|-------------|--|
| <b>Signature(s)</b>                        | Carl Waters |  |
| <b>Full name(s)</b>                        | Carl Waters |  |
| <b>Position (eg Secretary, Chair, etc)</b> | Trustee     |  |
| <b>Date</b>                                | 10/9/24     |  |