



# Trustees' Annual Report for the period

	Period start date				Period end date		
From	01	09	2023	To	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			
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### 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)	trust
Trustee selection methods (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**

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.

**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)**

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.

**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**

**Signature(s)** *Carl Waters*

**Full name(s)** Carl Waters

**Position (eg Secretary, Chair, etc)** Trustee

**Date** 24/6/25