



## Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	APRIL	2024		31	MARCH	2025

### Section A

### Reference and administration details

Charity name **THE SAROJBEN PATEL MEMORIAL TRUST**

Other names charity is known by

Registered charity number (if any) **1199770**

Charity's principal address **25 HEYBRIDGE ROAD, LEICESTER**

Postcode **LE5 0AP**

#### 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	Meena Dhobi	Trustee		
2	Rahoul Naik	Trustee		
3	Atulkumar Patel	Trustee		
4				

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

Name	Dates acted if not for whole year
NONE	

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
NONE		

#### Name of chief executive or names of senior staff members (Optional information)

**NONE – VOLUNTEERS ONLY**

### Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	CONSTITUTION
How the charity is constituted (eg. trust, association, company)	CHARITABLE INCORPORATED ORGANISATION (CIO)
Trustee selection methods (eg. appointed by, elected by)	Appointed By Governing Body

## 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.

All Trustees give their time voluntarily and can receive reasonable expenses incurred in the course of their duties but do not receive any remuneration.

Volunteers will be recruited as the need arises. Volunteers can receive reasonable expenses incurred in the course of their duties and may receive token honoraria for services rendered.

Declarations of Interests are made by Trustees and Volunteers, as applicable, and maintained in a register.

## Section C Objectives and activities

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

The prevention or relief of poverty or financial hardship anywhere in the world by providing or assisting in the provision of education, training, healthcare projects and all the necessary support designed to enable individuals to generate a sustainable income and be self-sufficient; and any other charitable purposes falling within charity law.

**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)**

SPMT was registered by the Charity Commission on 25 July 2022. Our intention is to make grants or donations to organisations; and to individuals in need. Organisations funded would exclusively be charitable, or not-for-profit. The Trustees have due regard to the Commission's guidance, and to the need to be open and fair in terms of equality, diversity and inclusion.

Trustees have due regard to the commission's public benefit guidance when exercising any powers or duties to which the guidance is relevant.

## Section D Achievements and performance

**Summary of the main achievements of the charity during the year**

In our early years our main work has been to raise donations income, and to ensure we have appropriate operational policies in place. We received a substantial donation of £10,000, and several smaller one-off donations. We also receive a regular monthly donation. This year we gave urgent grants totalling £700 to a mental health project and to individuals in need.

## Section E

## Financial review

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

At the end of the year, SPMT has **£23,181.16 in unrestricted reserves**. Our aim is to grow our total funds to £50k and, from the interest earned, to be in a position to give grants.

### Details of any funds materially in deficit

Not applicable.

### 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.

Income is sourced from donations from companies and individuals. Some donations qualify for Gift Aid. SPMT is registered with the HMRC for this purpose. Trustees have due regard to the Commission guidance on accepting donations. We do not receive any other grants or public funding.

Given our Funds balance, Trustees decided to open a savings account with our Bank on 1 July 2024. We received £683.86 in bank interest during the year.

We aim to maintain high standards of financial prudence and ethics. The Treasurer has some financial qualifications and experience. Other Trustees have more general business experience. Our turnover is below the threshold for external Examination or Audit.

## Section F

## Other optional information

Signature



Full name

Atulkumar Patel, MBE

Position

Trustee

Date

8 September 2025



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Charity Name

THE SAROJBEN PATEL MEMORIAL TRUST

No (if any)

1199770

## Receipts and payments accounts

CC16a

For the period  
from

Period start date  
01 April 2024

To

Period end date  
31 March 2025

### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
DONATIONS, GA	11,212	-	-	11,212	5,765
DONATIONS, OTHER	1,300	-	-	1,300	-
GIFT AID	3,066	-	-	3,066	1,303
SAVINGS ACCOUNT INTEREST	684	-	-	684	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>16,262</b>	<b>-</b>	<b>-</b>	<b>16,262</b>	<b>7,068</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>16,262</b>	<b>-</b>	<b>-</b>	<b>16,262</b>	<b>7,068</b>
<b>A3 Payments</b>					
GRANTS	700	-	-	700	608
DONATIONS	-	-	-	-	-
BANK CHARGES	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>700</b>	<b>-</b>	<b>-</b>	<b>700</b>	<b>608</b>
<b>A4 Asset and investment purchases, (see table)</b>					
BALANCE B/F UNREGISTERED CHARITY	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>700</b>	<b>-</b>	<b>-</b>	<b>700</b>	<b>608</b>
<b>Net of receipts/(payments)</b>	<b>15,562</b>	<b>-</b>	<b>-</b>	<b>15,562</b>	<b>6,460</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>7,619</b>	<b>-</b>	<b>-</b>	<b>7,619</b>	<b>1,159</b>
<b>Cash funds this year end</b>	<b>23,181</b>	<b>-</b>	<b>-</b>	<b>23,181</b>	<b>7,619</b>

### 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 £
<b>B1 Cash funds</b>				
	BANK ACCOUNT - CURRENT	1,489	-	-
	BANK ACCOUNT - SAVINGS	21,692	-	-
		-	-	-
	<b>Total cash funds</b>	<b>23,181</b>	<b>-</b>	<b>-</b>
		OK	OK	OK

		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>	<b>Details</b>			
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

		Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>	<b>Details</b>			
			-	-
			-	-
			-	-
			-	-
			-	-

		Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>	<b>Details</b>			
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

		Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>	<b>Details</b>			
			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on  
behalf of all the trustees

Signature	Print Name	Date of approval
	<b>ATULKUMAR PATEL</b>	<b>08-Sep-25</b>