



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Trustees' Annual Report for the period

From 01 April 2023 Period start date to 31 March 2024 Period end date

Charity name: HCR Hewitsons Charity

Charity registration number: 1201265

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The CIO seeks to support the charitable activities of organisations and individuals for such charitable purposes (for the public benefit) as are exclusively charitable according to the laws of England and Wales as the trustees may from time to time determine. Its objects include provision of support for any registered charity or to further any charitable purpose as is recognised by the Charity Commission chosen by the Trustees.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	The trust, via volunteers from the law firm HCR Legal LLP, undertook a number of fund raising events throughout the year. The trust periodically reviewed funds generated from these events and allocated grants to other charities, to support their causes, after undertaking due diligence.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have considered the guidance issued by the Charity Commission on public benefit and consider the allocation of grants accordingly.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	N/A
Policy on social investment including program related investment	Para 1.38	N/A
Contribution made by volunteers	Para 1.38	N/A
Other		N/A

Achievements and Performance

	SORP reference	
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Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	During the year, the trust raised funds through a number of initiatives – The total income into the trust during the year amounted to £85,019. There were exceptional donations in the year of £63,937 relating to the merger of the HCR Charity and the Hewitsons Charity into the current CIO. HCR LLP donated £2,998 of client residual balances to the trust in the year. During the year the trust did not give any individual grants in excess of £6,000. The HCR Hewitsons Charity raised £18,084.
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	N/A
Performance of fundraising activities against objectives set	Para 1.41	N/A
Investment performance against objectives	Para 1.41	N/A
Other		N/A

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The trust held a positive bank balance at the end of the financial year.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The trust does not have a reserves policy as it has no committed expenditure of overheads. Funds held are all banked and held at recognised High Street bank. Trustees will decide on charities to allocate unrestricted funds to.
Amount of reserves held	Para 1.22	£62,905
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	This is a newly formed charity which is expected to continue for the foreseeable future.

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	N/A
Investment policy and objectives including any social investment policy adopted	Para 1.46	N/A
A description of the principal risks facing the charity	Para 1.46	N/A
Other		N/A

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Trust Deed
How is the charity constituted? (e.g. unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Appointed by trustees

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	N/A
The charity's organisational structure and any wider network with which the charity works	Para 1.51	N/A
Relationship with any related parties	Para 1.51	N/A
Other		N/A

Reference and Administrative details

Charity name	HCR Hewitsons Charity
Other name the charity uses	Harrison Clark Rickerbys/HCR Legal LLP
Registered charity number	1201265
Charity's principal address	Harrison Clark Rickerbys 5 Deansway Worcester WR1 2JG

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	Adam Finch		14/09/2023	
2	Rachel Roberts		14/09/2023	
3	Virginia Henley		11/04/2023	
4	Colin Jones			
5	Daniel Curtis			

6	Inger Anson			
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15				
16				
17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

Director name		
N/A		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
N/A		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/A
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N/A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
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Name of chief executive or names of senior staff members (Optional information)

N/A

Exemptions from disclosure

Reason for non-disclosure of key personnel details

N/A

Other optional information

N/A

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	ADAM FINCH	
Position (eg Secretary, Chair, etc)	TRUSTEE	
Date		

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	Cash at bank and in hand	61,405	-	-
		-	-	-
		-	-	-
		-	-	-
	Total cash funds	61,405	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK

	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	Debtors	1,500	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
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 liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	Adam Finch	28/1/25



CHARITY COMMISSION
FOR ENGLAND AND WALES

HCR Hewitsons Charity

1201265

Receipts and payments accounts

CC16a

For the period
from

01 Apr 23

To

31 Mar 24

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					
Donations and Legacies	21,082	-	-	21,082	-
Funds transferred from HCR Charity	56,288	-	-	56,288	-
Funds transferred from Hewitsons Charity	7,649	-	-	7,649	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	85,019	-	-	85,019	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	85,019	-	-	85,019	-
A3 Payments					
Charitable Activities	22,114	-	-	22,114	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	22,114	-	-	22,114	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	22,114	-	-	22,114	-
Net of receipts/(payments)	62,905	-	-	62,905	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	62,905	-	-	62,905	-



Section A

Independent Examiner's Report

Report to the trustees

HCR Hewitsons Charity

On accounts for the year
ended

31 March 2024

Charity no
(if any)

1201265

Set out on pages

1 - 2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31/03/2024**.

Responsibilities and
basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

The charity's gross income exceeded £25,000 and I am qualified to undertake the examination by being a qualified member of ICAEW.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed:

Date: 28/01/2025

Name:

Felicity Sang

Relevant professional
qualification(s) or body
(if any):

FCA

Address:

Hazlewoods LLP, Staverton Court, Staverton, GL51 0UX

Section B

Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.