



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day	Month	Year		Day	Month	Year

Section A Reference and administration details

Charity name Northwest professional and ifa charitable trust

Other names charity is known by

Registered charity number (if any) 1201843

Charity's principal address 21 Hall green

Upholland

Postcode

WN8 0PB

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	Edward Cullen			
2	Steven Lavelle			
3	Stephen Wright			
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
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
N/a	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
N/a		

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

--

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	CIO
How the charity is constituted (eg. trust, association, company)	Foundation
Trustee selection methods (eg. appointed by, elected by)	Charity trustees appoint and elect new trustees where appropriate

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.

N/a

Section C Objectives and activities

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

To provide under privileged people with help from financial communities in northwest England

We are a charity of professional bodies whos aim is to provide equipment and venues to help the underprivileged to thrive and become active members of the communities they live in. Initially focused on north west but aim to go national in the future

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**

We have now in place a format to collect capital from as many ifa and professional bodies to start to collect capital to help.

Section E

Financial review

Brief statement of the charity's policy on reserves

We have not yet started to obtain any capital but will report this in are next returns

Details of any funds materially in deficit

n/a

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)



Full name(s)

EDWARD CULLEN

Position (eg Secretary, Chair, etc)

CHAIR

Date

29/09/2025