



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	06	07	2023		05	04	2024

Section A Reference and administration details

Charity name Hilary and David White Rose Foundation CIO

Other names charity is known by

Registered charity number (if any) 1203877

Charity's principal address

Murton Cottage

Ascott

Shipston-on-Stour

Postcode

CV36 5PP

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	D R Blakemore	Chair	06/07/2023 – 05/04/2024	
2	H M Blakemore	Trustee	06/07/2023 – 05/04/2024	
3	K M Blakemore	Trustee	06/07/2023 – 05/04/2024	
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

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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)	Constitution
How the charity is constituted (eg. trust, association, company)	CIO
Trustee selection methods (eg. appointed by, elected by)	Appointed by a resolution passed at a properly convened meeting of the charity 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.

--

Section C Objectives and activities

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

- | | |
|-----|---|
| 1.1 | The object of the CIO is to advance such charitable purposes (according to the law of England and Wales) as the trustees see fit from time to time. |
|-----|---|

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)

Donations have been made to registered charities in England for:

- The relief of the physical and mental sickness and distress of persons, in particular by preventative work, the provision of counselling and support;
- The provision of hospice services;
- The relief and assistance of people in any part of the world who are the victims of war or natural disaster, trouble, or catastrophe.
- The promotion for the benefit of the public the conservation and maintenance of historic artefacts and supporting design work by aspiring young designers.

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 was formally established on 6th July 2023 and made grants in line with its income to registered charities according to guidelines in its Grant Making Policy.

Section E

Financial review

Brief statement of the charity's policy on reserves

The charity will maintain reserves in proportion to its ongoing liabilities.

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)

DR Blakemore

H. M. Blakemore.

Full name(s)

DAVID ROBERT BLAKEMORE

HILARY MERCIA BLAKEMORE

Position (eg Secretary, Chair, etc)

CHAIR

TRUSTEE

Date

08/08/2024



CHARITY COMMISSION
FOR ENGLAND AND WALES

Hilary and David White Rose Foundation CIO

1203877

Receipts and payments accounts

CC16a

For the period
from

06/07/2023

To

05/04/2024

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 £
A1 Receipts					
Donations	19,605	-	-	19,605	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	19,605	-	-	19,605	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	19,605	-	-	19,605	-
A3 Payments					
Grants	18,000	-	-	18,000	-
Establishment Costs for Foundation	1,313	-	-	1,313	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	19,313	-	-	19,313	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	19,313	-	-	19,313	-
Net of receipts/(payments)	292	-	-	292	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	292	-	-	292	-

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		292	-	-
		-	-	-
		-	-	-
	Total cash funds	292	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
	H.M. Blakemore	H M BLAKEMORE	08/08/24	
	D.R. Blakemore	D R BLAKEMORE	08/08/24	