

REGISTERED CHARITY NUMBER: 1203878

**UNAUDITED FINANCIAL STATEMENTS
FOR THE PERIOD
6 JULY 2023 TO 31 MARCH 2024**

FOR

THE PHIL BENNETT FOUNDATION

Bevan Buckland LLP
Ground Floor Cardigan House
Castle Court
Swansea Enterprise Park
Swansea
SA7 9LA

THE PHIL BENNETT FOUNDATION

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FOR THE PERIOD 6 JULY 2023 TO 31 MARCH 2024**

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THE PHIL BENNETT FOUNDATION
REPORT OF THE TRUSTEES
FOR THE PERIOD 6 JULY 2023 TO 31 MARCH 2024

The trustees present their report with the financial statements of the charity for the period 6 July 2023 to 31 March 2024. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

Our Aim/Mission Statement

To raise charitable funds to help disadvantaged, disabled or underprivileged individuals to participate in sport.

Benefits derived from the Charity (including to the public)

Our aims fully reflect the purposes that the charity (Foundation) was set up to further and has been developed with due regard to the Charity Commission's guidance on public benefit.

The charity, benefits the public by providing financial support to those individuals who meet the above criteria and who are experiencing difficulties in accessing/participating in sport. Such difficulties can include financial hardship that is preventing that individual to participate in or access sport - e.g. an individual who cannot afford to pay an annual subscription fee to join a sporting club or an individual who is unable to participate in sport because they require specialist equipment / kit to do so which they cannot afford to purchase.

Participating in sport can offer a range of benefits including:

- Improved health and physical fitness
- Improved mental wellbeing
- Discipline and commitment
- Opportunities for team work and collaboration
- Improved confidence and social skills
- Reduced isolation

The first applicant that the foundation supported resulted in many of the benefits set out above. The application was received requesting financial support for an 8 year old boy . Like many children of that age, he wanted nothing more than to play sport with his friends. Unfortunately, in order to do so, he required specialist eyewear which his family could not afford to purchase and his coach therefore applied to the Foundation for support. Having reviewed the associated application, the Foundation was satisfied that the application met the required criteria and provided financial support to purchase the eyewear required. The feedback received from his mother captured exactly what the Foundation has been set up to achieve. She explained that prior to receiving this equipment, Finley had become increasingly distant from his friends and somewhat isolated as he was unable to join them in playing sport, which he found extremely frustrating. She confirmed that he was now enjoying playing a range of sports with his friends and was much happier as a result of being able to do so.

Application Process

Applications for financial support are made by completing an application form via the Foundation's website <https://philbennettfoundation.com/>

All applications must meet the Foundations Mission Statement and must be submitted by a teacher, coach or an official member/representative of an organisation. The charity does not accept applications direct from parents or individuals themselves. Two references are required for every application.

Each application is scrutinised objectively by an independent panel from within the Foundation's committee to ensure it meets the criteria set out in our aim. If it does, the applications is further scrutinised to determine how much funding should be provided. In some instances, this will not be the full amount applied for and each application (provide they meet the criteria) will be assessed on the individual circumstances attached to it. Where applications do not meet the criteria, the submitter is notified that the application has not been successful.

There are no geographical boundaries as to who can make an application to the Foundation.

Generation of monies

In order to generate funding to financially support those parties listed within our aim/mission statement, the Charity has held several events to date

They are as follows:

- Charity Launch Event - Feb 23
- Scarlet Fever - Sep 23
- Golf Day at Machynys - Oct 23
- Class of 87 Dinner - World Cup - Oct 23

THE PHIL BENNETT FOUNDATION
REPORT OF THE TRUSTEES
FOR THE PERIOD 6 JULY 2023 TO 31 MARCH 2024

- Galvin La Chapell - Wales vs England - Feb 24
- Golf Day in Dubai - Mar 24
- Celebration dinner 74 invincible Lions 50 years - Jun 24
- Golf Day at Royal Porthcawl - Oct 24
- Jacks vs Turks - Jan 25
- Golf Day at Machynys - Jun 25
- Lions Breakfast - Jul 25

The Charity has also received donations from other charities and/or organisations notable ones as follows:

- Bobby and Friends Charitable Trust
- Barbarians Rugby
- Scarlets Regional Rugby
- Llanelli Rural Council

Distribution of funding

As at the date of these accounts no applications had been received, subsequently applications have now been flowing in.

During the subsequent period, and in order to maximise the opportunity to encourage and enable individuals to participate in sport, the Charity has (through the Director of Education for Carmarthenshire) made £500 available to every primary school in the Carmarthenshire County. That money must be used for entirely for purchasing sporting equipment to be used in the school. There are a total of 96 schools in the Carmarthenshire County, many of which are located within deprived areas. To date 81 schools have applied and are in the process of receiving their £500 funding. If all 96 schools receive their £500 funding allocation, as is anticipated, the Foundation will have provided £48,000 to purchase sporting equipment that can be used and enjoyed by approximately 26,500 school children.

It is the intention of the Foundation to offer a £500 funding allocation to purchase sporting equipment to every primary school within a different county next year.

The Phil Bennett Foundation has also provided funding to the Scarlets Community Foundation to employ a Scarlets Regional Inclusion Lead Officer and a Scarlets Rugby Officer (Pembrokeshire). These roles will undertake an extensive range of activities to support access to rugby for mixed ability children (male and female), as well as individuals from a range of demographics, fostering engagement and inclusion. Such events/activities include:

Engagement Delivery Programme

- Primary School Festivals
- Run Festivals in Community Clubs to develop relationships
- CPD Events for Community Coaches - Qualify students to support rugby delivery with Primary Schools Programme
- Rugby Festivals
- Scarlets Match Day Festival & Half Time Rugby Experience - 8 - 10 teams per home fixture
- 12 Scarlets Rugby Camps
- Support Girls Hubs
- Support National Events - Royal Welsh, Urdd Eisteddfod, Pembrokeshire Show, Club Festivals, School Requests

Inclusion Programme

- 30 Fit Fed Fun Camps delivered in Socially Deprived Areas
- Support and facilitate Mixed Ability Rugby Festivals. (Guest Sessions, Training Facility, Kit)
- Established Inclusive Community Clubs to provide mixed ability Pathway.
- Support In- Sport Disability Events
- Facilitate Walking Rugby Festivals.
- Facilitate Disability Events across the 3 Local Authorities
- Facilitate Deaf Community Events
- Support our Wheelchair Rugby Programme - Roadshow - Haverfordwest & Aberystwyth
- Ethnic Minority Groups - Deliver Sessions in a Mosque / Support International Multicultural Group / Polish Community / Syrian Community
- Support Veterans Programme
- Homeless Support with Local Authorities
- NEET Children Programme with Local Authorities
- STAR - Scheme supporting children with ACES
- Sporting Memories Programmes

The Scarlets Community Foundation provides a quarterly activity report to the Phil Bennett Foundation which sets out the activities undertaken by the above Officers.

THE PHIL BENNETT FOUNDATION
REPORT OF THE TRUSTEES
FOR THE PERIOD 6 JULY 2023 TO 31 MARCH 2024

Plan for the future

It is the intention of the foundation to continue and build on the success of the foundation's working model to date both in holding further events to generate funds and also to continue to distribute funding to successful applicants.

Publicity and promotion of The Phil Bennett Foundation is key to ensure the aim and objectives of the charity remain forefront and of utmost importance.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust and constitutes an unincorporated charity.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity number

1203878

Principal address

C/o Albanyoak Ltd
North Dock
Llanelli
Carmarthenshire
SA15 2LF

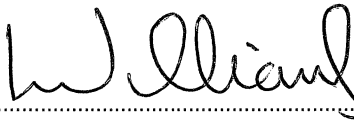
Trustees

A L Stewart (appointed 6.7.23)
J J Bennett (appointed 6.7.23)
D L Quinnell (appointed 6.7.23)
I W Williams (appointed 6.7.23)
S J Bennett (appointed 6.7.23)

Independent Examiner

Bevan Buckland LLP
Ground Floor Cardigan House
Castle Court
Swansea Enterprise Park
Swansea
SA7 9LA

Approved by order of the board of trustees on13/10/2025..... and signed on its behalf by:



I W Williams - Trustee

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
THE PHIL BENNETT FOUNDATION**

Independent examiner's report to the trustees of The Phil Bennett Foundation

I report to the charity trustees on my examination of the accounts of The Phil Bennett Foundation (the Trust) for the period 6 July 2023 to 31 March 2024.

Responsibilities and basis of report

As the charity trustees of the Trust 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 Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under Section 145(5)(b) of the Act.

Independent examiner's statement

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

1. accounting records were not kept in respect of the Trust as required by Section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do 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.



Andrew Silk ACA

Bevan Buckland LLP
Ground Floor Cardigan House
Castle Court
Swansea Enterprise Park
Swansea
SA7 9LA

Date: 13/10/2025

THE PHIL BENNETT FOUNDATION
STATEMENT OF FINANCIAL ACTIVITIES
FOR THE PERIOD 6 JULY 2023 TO 31 MARCH 2024

	Notes	Unrestricted fund £
INCOME AND ENDOWMENTS FROM		
Donations and legacies		16,251
Other trading activities	2	224,949
Total		<u>241,200</u>
 EXPENDITURE ON		
Raising funds		98,264
Charitable activities		
Sports Accessibility		2,458
Total		<u>100,722</u>
 NET INCOME		 140,478
 TOTAL FUNDS CARRIED FORWARD		 <u><u>140,478</u></u>


The notes form part of these financial statements

THE PHIL BENNETT FOUNDATION

BALANCE SHEET
31 MARCH 2024

	Notes	Unrestricted fund £
CURRENT ASSETS		
Debtors	4	4,320
Cash at bank		151,178
		<hr/> 155,498
CREDITORS		
Amounts falling due within one year	5	(15,020)
		<hr/>
NET CURRENT ASSETS		140,478
		<hr/>
TOTAL ASSETS LESS CURRENT LIABILITIES		140,478
		<hr/>
NET ASSETS		140,478
		<hr/> <hr/>
FUNDS	6	
Unrestricted funds		140,478
		<hr/>
TOTAL FUNDS		140,478
		<hr/> <hr/>

The financial statements were approved by the Board of Trustees and authorised for issue on 13/10/2025 and were signed on its behalf by:



I W Williams - Trustee

THE PHIL BENNETT FOUNDATION
NOTES TO THE FINANCIAL STATEMENTS
FOR THE PERIOD 6 JULY 2023 TO 31 MARCH 2024

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

Capital Grants

Grants received which are used to purchase capital items are treated as restricted funds in the balance sheet and released to the income and expenditure account over the life of the asset to which they relate.

Cash at bank and in hand

Cash at bank and cash in hand includes cash and short term highly liquid investments held within a deposit or similar account.

Debtors

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

Creditors

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

Going Concern

The trustees have assessed the company's financial position as at the reporting date, and forecasted earnings for the foreseeable future. Taking into consideration the net surplus position at the year end and future earnings, the trustees believe that the charity has sufficient resources to meet its obligations for the foreseeable future. Accordingly, the trustees have prepared these accounts on a going concern basis.

THE PHIL BENNETT FOUNDATION

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE PERIOD 6 JULY 2023 TO 31 MARCH 2024

2. OTHER TRADING ACTIVITIES

	£
Fundraising events	2,010
Auctions	52,027
Sponsorships	170,912
	<u>224,949</u>

3. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the period ended 31 March 2024.

Trustees' expenses

There were no trustees' expenses paid for the period ended 31 March 2024.

4. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	£
Prepayments and accrued income	<u>4,320</u>

5. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	£
Other creditors	<u>15,020</u>

6. MOVEMENT IN FUNDS

	Net movement in funds £	At 31.3.24 £
Unrestricted funds		
General fund	140,478	140,478
TOTAL FUNDS	<u>140,478</u>	<u>140,478</u>

Net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	241,200	(100,722)	140,478
TOTAL FUNDS	<u>241,200</u>	<u>(100,722)</u>	<u>140,478</u>

7. RELATED PARTY DISCLOSURES

During the period, income totalling £1,500 was received from an organisation controlled by a trustee of this charity.

Trustees will have purchased tables at events of the Charity, no preferential price or treatment is given to the Trustees as part of this arrangement

THE PHIL BENNETT FOUNDATION
DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE PERIOD 6 JULY 2023 TO 31 MARCH 2024

£

INCOME AND ENDOWMENTS

Donations and legacies

Donations	16,251
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Other trading activities

Fundraising events	2,010
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Auctions	52,027
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Sponsorships	170,912
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224,949

Total incoming resources	241,200
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EXPENDITURE

Raising donations and legacies

Advertising	444
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Speakers costs	5,621
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Entertainment	1,403
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Travelling	880
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Clothing	6,000
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Venue & equipment hire costs	83,916
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98,264

Support costs

Management

Insurance	702
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Finance

Bank charges	402
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Information technology

Computer costs	1,354
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Total resources expended	100,722
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Net income	140,478
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