

REPORT OF THE TRUSTEES

FOR THE YEAR ENDED 31 MARCH 2025

LEGAL AND ADMINISTRATIVE DETAILS

Charity Name: JOHN LEE CHARITABLE FOUNDATION

Charity Registration Number: 1209636

Date of Formation: 16 August 2024

Principal Office: Coombe Barton
Shobrooke
Credition
Devon
EX17 1BS

Trustees

The Trustees who served during the period are as follows:

Matthew Crooke
John Lee OBE DL
Victoria Leeming
Peter Morris
Joanna Robson

Bankers

National Westminster Bank plc
250 Bishopsgate
London
EC2M 4AA

Solicitors

Tozers LLP
Broadwalk House
Southernhay West
Exeter
EX1 1UA

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing Document

The Charity is CIO - FOUNDATION as set out in its Governing Document

Trustees

The Trustees are as listed and have managed and administered the Charity since inception.

All Trustees give their time voluntarily and received no benefits from the charity.

OBJECTS AND ACTIVITIES

1) To advance in life and help young people, in particular those living in rural communities, by assisting in the provision of: (A) support and activities which develop their skills, capacities and capabilities, self-reliance and individual responsibilities to enable them to participate in society as mature, caring and responsible individuals; and (B), recreational and leisure time activities provided in the interest of social welfare, designed to improve their conditions of life; and (2) to further such other purposes which are charitable according to the laws of England and Wales (in particular, but not exclusively, for the benefit of people in Devon) as the charity trustees see fit from time to time.

Achievement

The charity, being newly formed did not make any financial donations.

FINANCIAL REVIEW

The charity received £20,005 income in the financial period, principally as donations. Total expenditure was £nil.

At the year end, the charity held £20,005 in bank accounts and cash deposits.

Principal Funding Source

The principal funding source for the charity are donations.

Investment Policy

The trustees have agreed that their priority is to grow the charitable fund.

Related Party Transactions

There have been no related party transactions.

Safeguarding

There are no safeguarding issues that affect this charity.

JOHN LEE CHARITABLE FOUNDATION -A registered charity in England and Wales
(number 1209636)

Statement of Account for the year ended 31 March 2025

Income

Donation	£20,005.00
Interest	£ 0.00
Total	£20,005.00

Expenditure

Grants	£ 0.00
Charity Expenses	£ 0.00
Total	£. 0.00

Balance Sheet

Investments

Balance at bank -	current account	No. 72695765	£ 5.00
-	liquidity manager	No. 72695773	£ 20,000.00
		Total	£20,005.00

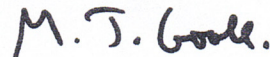
Approved by the trustees on 24 June 2025

Signed

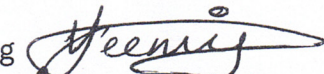
John Lee



Matthew Crooke



Victoria Leeming



Peter Morris



Joanna Robson





CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Independent Examiner's Report

Report to the trustees of

JOHN LEE CHARITABLE FOUNDATION

On accounts for the year
ended

31 MARCH 2025

Charity no
(if any)

1209636

Set out on pages

As attached

**Respective
responsibilities of
trustees and examiner**

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

**Basis of independent
examiner's statement**

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

**Independent
examiner's statement**

In connection with my examination, no material matters have come to my attention which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Charities Act or
- the accounts do not accord with the accounting records

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

Signed:

Date:

9/7/25

Name:

SHAUN GILLANDERS

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

ICAEW

Address:

WINDSCOTT LAWN, PETERS MARLAND, TOLLINGTON, GR38 8QD