

THE TIRLEY ELM ESTATE AND ALMSHOUSE CHARITY

England & Wales · Charity number 202739

Details

Other names	THE TIRLEY ELM ESTATE
Status	Registered
Legal form	Other
Registered	1962-02-12
Register	View on the Charity Commission register

Contact

Address	Hill View The Knowle Tirley Gloucester GL19 4HE
Phone	01452780714
Email	tpadey@gmail.com

Activities

Objects: (1) FOR RELIEF IN NEED IN ACCORDANCE WITH THE PROVISIONS HEREINAFTER CONTAINED; (2) FOR OTHER CHARITABLE PURPOSES FOR THE BENEFIT OF THE INHABITANTS OF THE PARISH OF TIRLEY. FOR FURTHER DETAIL SEE SCHEME.

Activities: Provides accommodation for people in need in the Parish of Tirley.

Classification

- **How:** Provides Buildings/facilities/open Space
- **What:** The Prevention Or Relief Of Poverty, Accommodation/housing
- **Who:** The General Public/mankind

Geography

- **Area of benefit:** PARISH OF TIRLEY
- Gloucestershire

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£39,607	£37,543	-	-
2023-12-31	£38,942	£41,954	-	-
2022-12-31	£37,865	£27,029	-	-
2021-12-31	£30,070	£53,557	-	-
2020-12-31	£36,087	£18,111	-	-

Trustees

Name	Role	Appointed
Timothy Phillip Adey	Chair	2022-04-20
Amanda Grace Quiney		2016-08-09
Anthony James Smith		2024-02-07
COLIN FRANKLIN		
HARRY WARNER		
LAURA WARNER		
Rev JOHN LONGUET-HIGGINS		2013-06-05

THE TIRLEY ELM ESTATE AND ALMSHOUSE CHARITY

England & Wales - Charity number 202739

Accounts

Tirley Elm Estate & Almshouse Charity

Registered Charity No.202739

Report of the Trustees for the year ending 31st December 2024

Name of the Charity: Tirley Elm Estate and Almshouse Charity

Registered Address: Hill View, The Knowle, Tirley, Gloucester, GL19 4HE

Scheme sealed by the Charity Commission 18th November 1987

Trustees:

Mr Tim Adey (Chair)

Mr Colin Franklin (Vice Chair)

Mrs. A. Quiney (Treasurer)

Rev. John Longuet-Higgins (Ex-officio Trustee)

Mr Harry Warner

Mrs Laura Warner

Mr Tony Smith, appointed 7 February 2024

The Trustees of Tirley Elm Estate and Almshouse Charity (Unincorporated) present their Annual Return and the Independently Examined Accounts for the year ended 31st December 2024 and confirm they comply with the Trust Deed.

Our Aims

The aims of the Charity are to meet the objects defined in the Trust Deed sealed on 18th November 1987, namely the relief in need, in accordance with the provisions contained in the Scheme and for other charitable purposes for public benefit and the benefit of the inhabitants of the Parish of Tirley.

Our Finances

The financial viability of the Charity continues to improve. Taking the year as a whole, income has been maintained and capital growth has improved from COIF investments. The Trustees have continued a policy of investing for the longer term. Income from weekly maintenance contributions has remained steady.

Financial Health.

The Trustees regularly review the finances, budget, and spend against budget.

Investment Policy and Performance.

Investment activities are managed in line with the Requirements of the Trustees Act 2000. Our investment policy is low risk for the growth of the portfolio of investments. Funds not invested are held on deposit to earn interest.

Reserves.

The held reserves are £683,827.86 in COIF shares, and a combined total of £21,270.65 held in a Lloyds Treasurers Account and a Deposit Account. In the 10 year plan the reserves will be used to maintain and improve the charity's properties.

Review of Activities and Achievements

During the year, of the seven properties, all have been occupied full time. General maintenance issues are dealt with as they occur. A review of all outstanding maintenance issues has been completed and findings acted on.

Future Plans.

The Trustees intend to continue their current strategies of maintaining and refurbishing the properties as required. Future plans will be financed from Weekly Maintenance Contributions, land rent and/or reserves.

Recruitment of Trustees.

All Trustees are unpaid volunteers. There are two Co-optative Trustees appointed by the other five Trustees, there are currently four Nominative Trustees appointed by the Parish Council (normally recommended by the other Trustees when a vacancy arises) and the vicar as Ex-Officio Trustee. Recruitment is by request or advertisement from the local village population. The most suitable applicant with local knowledge, experience and relevant qualifications is the one appointed.

Serious Incidents. The Trustees are pleased to confirm that there are no serious incidents that should have been notified to the Charity Commission during 2024.

**INDEPENDENT EXAMINER’S REPORT TO THE TRUSTEES OF
TIRLEY ELM ESTATES AND ALMSHOUSE CHARITY**

I report on the accounts of the Trust for the year ended 31 December 2024, which are set out on pages 1 to 2.

Responsibilities and basis of report

The charity’s trustees are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 (the Act). The charity’s trustees consider that an audit is not required for this year (under the Act) and that an independent examination is needed.

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

I have completed 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 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.

Felicity Sang
.....

**Felicity Sang FCA
HAZLEWOODS LLP**

25/7/2025
.....
Date

**Chartered Accountants and Registered Auditors
Staverton Court,
Staverton,
Cheltenham,
Gloucestershire,
GL51 0UX**

Tirley Elm Estate & Almshouse Charity

**Receipts and Payments' Account for the
Year Ended 31 December 2024**

Receipts		Payments	
2023	2024	2023	2024
£	£	£	£
£ 36,154.79	£ 36,937.11	£ 196.00	£ 343.00
Maintenance contributions		Almshouse Association	
£ 720.00	£ 720.00	£ 1,315.31	£ 1,256.46
Land rents		Insurance	
£ 2,043.87	£ 1,920.29	£ 3,807.20	£ 19,311.06
COIF dividends		Building maintenance	
£ 3.55	£ 3.55	£ 69.46	£ 69.46
Wayleaves		Repayment Hockney Meadow	
		£ 150.00	£ 150.00
		Extraordinary repair fund - repaid	
		£ 500.00	£ 500.00
		Secretarial expenses	
		£ 360.00	£ 360.00
		Audit payment	
£ 19.42	£ 26.53	£ 2,030.83	£ 2,646.12
Interest on deposit account		Electricity and rates	
		£ 2,876.00	£ 2,429.00
		Grounds maintenance	
		£ -	£ -
		Cleaning	
		£ 288.78	£ 478.06
		Sundry	
		£ 30,000.00	£ 10,000.00
		COIF investment	
£ 38,941.63	£ 39,607.48	£ 41,593.58	£ 37,543.16
Income for the year		Expenditure for the year	
<u>£ 21,858.28</u>	<u>£ 19,206.33</u>	<u>£ 19,206.33</u>	<u>£ 21,270.65</u>
Bank balances brought forward		Bank balances carried forward	
<u>£ 60,799.91</u>	<u>£ 58,813.81</u>	<u>£ 60,799.91</u>	<u>£ 58,813.81</u>

All receipts and payments made in the year are unrestricted.

Treasurer Amanda Quincey AG

Chairman Timothy Adey

09 July 2025

Approved at a meeting of the Trustees held on

Tirley Elm Estate & Almshouse Charity

Statement of Assets and Liabilities

As at 31 December 2024

Cash balances on receipts and payments carried forward:

	£
Lloyds Treasurers' Account	19,016.98
Lloyds Bus Bank Instant Account	<u>2,253.67</u>
	<u>21,270.65</u>

	Number of Shares	Unit Value £	Total Value £
COIF Income Shares a/c CO3059153-001	3,476.2800	20.2933	70,545.19
COIF Accumulation Shares			
ERF Scheme a/c CO3059152-001	111.9099	260.6156	29,165.47
Recoupment Order a/c CO3059154-001	47.3130	260.6156	12,330.51
Development Fund a/c CO3059155-001	2,193.9849	260.6156	<u>571,786.69</u>
			<u>683,827.86</u>

Non-monetary assets:-

The properties below are identified as heritage assets:-

Row of three brick and tile cottages with fitted kitchens
 One pair of semi-detached bungalows
 One pair of semi-detached bungalows (built 2007) + approx
 0.38 acres of land

One parcel of land let to J Cobourn (approx 1.15 acres)
 One parcel of land Corse Lawn (approx 4.151 acres)
 One parcel of land at Tirley Cross (approx 0.26 acres)

THE TIRLEY ELM ESTATE AND ALMSHOUSE CHARITY

England & Wales - Charity number 202739

Accounts

Tirley Elm Estate & Almshouse Charity

Registered Charity No.202739

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Name of the Charity: Tirley Elm Estate and Almshouse Charity

Registered Address: Hill View, The Knowle, Tirley, Gloucester, GL19 4HE

Scheme sealed by the Charity Commission 18th November 1987

Trustees:

Mr Tim Adey (Chair), appointed January 2023

Mr Colin Franklin (Vice Chair)

Mrs. A. Quiney (Treasurer)

Rev. John Longuet-Higgins (Ex-officio Trustee)

Mr Harry Warner

Mrs Laura Warner

The Trustees of Tirley Elm Estate and Almshouse Charity (Unincorporated) present their Annual Return and the Independently Examined Accounts for the year ended 31st December 2023 and confirm they comply with the Trust Deed.

Our Aims

The aims of the Charity are to meet the objects defined in the Trust Deed sealed on 18th November 1987, namely the relief in need, in accordance with the provisions contained in the Scheme and for other charitable purposes for public benefit and the benefit of the inhabitants of the Parish of Tirley.

Our Finances

The financial viability of the Charity continues to improve. Taking the year as a whole, income has been maintained and capital growth has improved from COIF investments. The Trustees have continued a policy of investing for the longer term. Income from weekly maintenance contributions has remained steady.

Financial Health

The Trustees regularly review the finances, budget, and spend against budget.

Investment Policy and Performance

Investment activities are managed in line with the Requirements of the Trustees Act 2000. Our investment policy is low risk for the growth of the portfolio of investments. Funds not invested are held on deposit to earn interest.

Reserves

The held reserves are £642,328.75 in COIF shares, and £19,206.33 held in a Lloyds Deposit Account. In the 10 year plan the reserves will be used to maintain and improve the charity's properties.

Review of Activities and Achievements

During the year, of the seven properties, all have been occupied full time. General maintenance issues are dealt with as they occur. A review of all outstanding maintenance issues has been completed and findings acted on.

Future Plans

The Trustees intend to continue their current strategies of maintaining and refurbishing the properties as required. Future plans will be financed from Weekly Maintenance Contributions, land rent and/or reserves.

Recruitment of Trustees

All Trustees are unpaid volunteers. There are two Co-optative Trustees appointed by the other five Trustees, there are currently three Nominative Trustees appointed by the Parish Council (normally recommended by the other Trustees when a vacancy arises) and the vicar as Ex-Officio Trustee. Following the resignation of a Trustee, a Nominative Trustee vacancy is in the process of being filled, this will be confirmed at our next meeting of the Trustees. Recruitment is by request or advertisement from the local village population. The most suitable applicant with local knowledge, experience and relevant qualifications is the one appointed.

Serious Incidents

The Trustees are pleased to confirm that there are no serious incidents that should have been notified to the Charity Commission during 2023.

Tirley Elm Estate & Almshouse Charity

**Receipts and Payments' Account for the
Year Ended 31 December 2023**

Receipts		Payments	
2022		2023	
£		£	£
£ 35,253.99	Maintenance contributions	£ 36,154.79	£ 187.00 Almshouse Association
£ 720.00	Land rents	£ 720.00	£ 1,122.44 Insurance
£ 1,886.57	COIF dividends	£ 2,043.87	£ 11,139.36 Building maintenance
£ 3.55	Wayleaves	£ 3.55	£ 69.46 Repayment Hockney Meadow
			£ 150.00 Extraordinary repair fund - repaid
			£ 500.00 Secretarial expenses
			£ 360.00 Audit payment
£ 1.13	Interest on deposit account	£ 19.42	£ 1,636.20 Electricity and rates
			£ 1,713.00 Grounds maintenance
			£ - Cleaning
			£ 151.50 Sundry
			£ 10,000.00 COIF investment
£ 37,865.24	Income for the year	£ 38,941.63	£ 27,028.96 Expenditure for the year
£ 11,022.00	Bank balances brought forward	£ 21,858.28	£ 21,858.28 Bank balances carried forward
<u>£ 48,887.24</u>		<u>£ 60,799.91</u>	<u>£ 19,206.33</u>
			<u>£ 60,799.91</u>

Treasurer

Chairman

Approved at a meeting of the Trustees held on

**INDEPENDENT EXAMINER’S REPORT TO THE TRUSTEES OF
TIRLEY ELM ESTATES AND ALMSHOUSE CHARITY**

I report on the accounts of the Trust for the year ended 31 December 2023, which are set out on pages 1 to 2.

Responsibilities and basis of report

The charity’s trustees are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 (the Act). The charity’s trustees consider that an audit is not required for this year (under the Act) and that an independent examination is needed.

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

I have completed 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 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.



.....
**Martin Howard FCA
HAZLEWOODS LLP**

28 February 2024

.....

Date

**Chartered Accountants and Registered Auditors
Windsor House
Bayshill Road
Cheltenham
GL50 3AT**

THE TIRLEY ELM ESTATE AND ALMSHOUSE CHARITY

England & Wales - Charity number 202739

Accounts

Tirley Elm Estate & Almshouse Charity

Registered Charity No.202739

Report of the Trustees for the year ending 31st December 2022

**Name of the Charity: Tirley Elm Estate and Almshouse
Charity**

**Registered Address: Hill View, The Knowle, Tirley,
Gloucestershire, GL19 4HE**

**Scheme sealed by the Charity Commission 18th
November 1987**

Trustees:

Mr. Tim Adey, (Chairman)
Mr Colin Franklin (Vice Chair),
Mrs. A. Quiney (Treasurer),
Rev. John Longuet-Higgins (Ex-officio Trustee),
Mr Harry Warner,
Mrs Laura Warner,
Mrs Patricia Sharman, resigned December 2022

The Trustees of Tirley Elm Estate and Almshouse Charity (Unincorporated) present their Annual Return and the Independently Examined Accounts for the year ended 31st December 2022 and confirm they comply with the Trust Deed.

Our Aims

The aims of the Charity are to meet the objects defined in the Trust Deed sealed on 18th November 1987, namely the relief in need, in accordance with the provisions contained in the Scheme and for other charitable purposes for public benefit and the benefit of the inhabitants of the Parish of Tirley.

Our Finances

The viability of the Charity is positive and increases in the cost of living are being monitored. Taking the year as a whole income has increased due to the full occupancy of the properties whilst capital growth from COIF investments has decreased slightly due to market volatility. The Trustees have continued a policy of investing for the longer term.

Financial Health.

The Trustees regularly review the finances, budget, and spend against budget.

Investment Policy and Performance.

Investment activities are managed in line with the Requirements of the Trustees Act 2000. Our investment policy is a low risk approach for the growth of the portfolio of investments. Funds not invested are held on deposit to earn interest.

Reserves.

The held reserves are £544,355.62 in COIF shares, £19,650.56 in a Lloyds Treasurers Account and £2,207.72 in a Lloyds Deposit Account. These reserves will cover a year's worth of expenditure and the 10 year plan to maintain and improve the Charity's properties.

Review of Activities and Achievements

During the year the seven properties have been occupied full time.

General maintenance issues are dealt with as they occur. A review of all outstanding maintenance issues has been completed and findings acted on.

Future Plans.

The Trustees intend to continue their current strategies of maintaining and refurbishing the properties as required. Our future plans are financed from Weekly Maintenance Contributions and land rent.

Recruitment of Trustees.

All Trustees are unpaid volunteers. There are two Co-optative Trustees appointed by the other five Trustees, there are four Nominative Trustees appointed by the Parish Council (normally recommended by the other Trustees when a vacancy arises) and the vicar as Ex-Officio Trustee. Recruitment is by request or advertisement from the local village population. The most suitable applicant with local knowledge, experience and relevant qualifications is the one appointed.

Serious Incidents. The Trustees are pleased to confirm that there are no serious incidents that should have been notified to the Charity Commission during 2022.

Tirley Elm Estate & Almshouse Charity

Receipts and Payments' Account for the
Year Ended 31 December 2022

Receipts		Payments	
2021	2022	2021	2022
£	£	£	£
£ 27,508.89	£ 35,253.99	£ -	£ 187.00
£ 720.00	£ 720.00	£ 1,031.68	£ 1,122.44
£ 1,838.26	£ 1,886.57	£ 35,087.38	£ 11,139.36
£ 3.55	£ 3.55	£ 69.46	£ 69.46
		£ 150.00	£ 150.00
		£ 544.98	£ 500.00
		£ 342.00	£ 360.00
£ 0.24	£ 1.13	£ 2,328.14	£ 1,636.20
		£ 3,817.00	£ 1,713.00
		£ -	£ -
		£ 187.00	£ 151.50
		£ 10,000.00	£ 10,000.00
		£ 53,557.64	£ 27,028.96
<u>£ 30,070.94</u>	<u>£ 37,865.24</u>		
		£ 11,022.00	£ 21,858.28
£ 34,508.70	£ 11,022.00	£ 64,579.64	£ 48,887.24
£ 64,579.64	£ 48,887.24		

Treasurer Amanda Quiney

Chairman [Signature]

Approved at a meeting of the Trustees held on 12/05/23

**INDEPENDENT EXAMINER’S REPORT TO THE TRUSTEES OF
TIRLEY ELM ESTATES AND ALMSHOUSE CHARITY**

I report on the accounts of the Trust for the year ended 31 December 2022, which are set out on pages 1 to 2.

Responsibilities and basis of report

The charity’s trustees are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 (the Act). The charity’s trustees consider that an audit is not required for this year (under the Act) and that an independent examination is needed.

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

I have completed 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 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.



.....
Martin Howard FCA
HAZLEWOODS LLP
Chartered Accountants and Registered Auditors
Windsor House
Bayshill Road
Cheltenham
GL50 3AT

.....
2 May 2023
Date

THE TIRLEY ELM ESTATE AND ALMSHOUSE CHARITY

England & Wales - Charity number 202739

Accounts

Tirley Elm Estate & Almshouse Charity

Registered Charity No.202739

Report of the Trustees for the year ending 31st December 2021

Name of the Charity: Tirley Elm Estate and Almshouse Charity

Registered Address: 38 The Street, Tirley, Gloucester. GL19 4ES

Scheme sealed by the Charity Commission 18th November 1987

Trustees:

Mrs Patricia Sharman (Chair),
Mr Colin Franklin (Vice Chair),
Mrs. A. Quiney (Treasurer),
Rev. John Longuet-Higgins (Ex-officio Trustee),
Mr Brian Pegler, resigned September 2021
Mr Harry Warner,
Mrs Laura Warner,
Mr. Tim Adey. (November 2021)

The Trustees of Tirley Elm Estate and Almshouse Charity (Unincorporated) present their Annual Return and the Independently Examined Accounts for the year ended 31st December 2021 and confirm they comply with the Trust Deed.

Our Aims

The aims of the Charity are to meet the objects defined in the Trust Deed sealed on 18th November 1987, namely the relief in need, in accordance with the provisions contained in the Scheme and for other charitable purposes for public benefit and the benefit of the inhabitants of the Parish of Tirley.

Our Finances

The financial viability of the Charity continues to improve year on year. Taking the year as a whole income has been maintained and capital growth has improved from COIF investments. The Trustees have continued a policy of investing for the longer term. Income from weekly maintenance contributions has remained steady.

Financial Health.

The Trustees regularly review the finances, budget, and spend against budget.

Investment Policy and Performance.

Investment activities are managed in line with the Requirements of the Trustees Act 2000. Our investment policy is a low risk approach for the growth of the portfolio of investments. Funds not invested are held on deposit to earn interest.

Reserves.

The held reserves are £589,803.95 in COIF shares, and £2,206.59 held in a Lloyds Deposit Account. In the 10 year plan the reserves will be used to maintain and improve the charity's properties.

Review of Activities and Achievements

During the year, of the seven properties, three became vacant. One of the properties has been refurbished, all have new residents.

General maintenance issues are dealt with as they occur.

A review of all outstanding maintenance issues has been completed and findings acted on.

A new Trustee has been recruited, Mr. Tim Adey, who replaces Mr. Brian Peglar who retired in September.

Future Plans.

The Trustees intend to continue their current strategies of maintaining and refurbishing the properties as required. Our future plans are financed from Weekly Maintenance Contributions and land rent.

Recruitment of Trustees.

All Trustees are unpaid volunteers. There are two Co-optative Trustees appointed by the other five Trustees, there are four Nominative Trustees appointed by the Parish Council (normally recommended by the other Trustees when a vacancy arises) and the vicar as Ex-Officio Trustee. Recruitment is by request or advertisement from the local village population. The most suitable applicant with local knowledge, experience and relevant qualifications is the one appointed.

Serious Incidents. The Trustees are pleased to confirm that there are no serious incidents that should have been notified to the Charity Commission during 2021.

Tirley Elm Estate & Almshouse Charity

Statement of Assets and Liabilities

As at 31 December 2021

Cash balances on receipts and payments carried forward:

	£
Lloyds Treasurers' Account	8,815.41
Lloyds Bus Bank Instant Account	<u>£ 2,206.59</u>
	<u>11,022.00</u>

	Number of Shares	Unit Value p	Total Value £
COIF Income Shares a/c 398410001T	3,476.28	2,056.64	71,494.56
COIF Accumulation Shares			
ERF Scheme a/c 398410001R	110.06	24,252.25	26,692.03
Recoupment Order a/c 398410002R	46.42	24,252.25	11,257.89
Development Fund a/c 398410003R	1,980.68	24,252.25	<u>480,359.47</u>
			<u>589,803.95</u>

Non-monetary assets:-

Row of three brick and tile cottages with fitted kitchens
One pair of semi-detached bungalows
One pair of semi-detached bungalows (built 2007) + approx
0.38 acres of land
One parcel of land let to J Cobourn (approx 1.15 acres)
One parcel of land Corse Lawn (approx 4.151 acres)
One parcel of land at Tirley Cross (approx 0.26 acres)

Debtors:-

B Smith

£ 314.00

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
TIRLEY ELM ESTATES AND ALMSHOUSE CHARITY**

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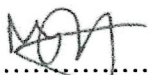
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.....
Martin Howard FCA
HAZLEWOODS LLP
Chartered Accountants and Registered Auditors
Windsor House
Bayshill Road
Cheltenham
GL50 3AT

7 March 2022
.....
Date

THE TIRLEY ELM ESTATE AND ALMSHOUSE CHARITY

England & Wales - Charity number 202739

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Registered Charity No.202739

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The Trustees regularly review the finances, budget, and spend against budget.

Investment Policy and Performance.

Investment activities are managed in line with the Requirements of the Trustees Act 2000. Our investment policy is a low risk approach for the growth of the portfolio of investments. Funds not invested are held on deposit to earn interest.

Reserves.

The held reserves are £492,322.11 in COIF shares, and £32,302.25 held in a Lloyds Deposit Account. In the 10 year plan the reserves will be used to maintain and improve the charity's properties.

Review of Activities and Achievements

Of the seven properties one is currently vacant, maintenance is on-going in that property. It will be advertised as soon as it is ready.

General maintenance issues are dealt with as they occur.

A review of all outstanding maintenance issues has been completed and findings acted on.

Future Plans.

The Trustees intend to continue their current strategies of maintaining and refurbishing the properties as required. Our future plans are financed from Weekly Maintenance Contributions and land rent.

Recruitment of Trustees.

All Trustees are unpaid volunteers. There are two Co-optative Trustees appointed by the other five Trustees, there are four Nominative Trustees appointed by the Parish Council (normally recommended by the other Trustees when a vacancy arises) and the vicar as Ex-Officio Trustee. Recruitment is by request or advertisement from the local village population. The most suitable applicant with local knowledge, experience and relevant qualifications is the one appointed.

Serious Incidents. The Trustees are pleased to confirm that there are no serious incidents that should have been notified to the Charity Commission during 2020.

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
TIRLEY ELM ESTATES AND ALMSHOUSE CHARITY**

I report on the accounts of the Trust for the year ended 31 December 2020, which are set out on pages 1 to 2.

Responsibilities and basis of report

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


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

I have completed 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 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.

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Martin Howard FCA
HAZLEWOODS LLP
Chartered Accountants and Registered Auditors

18 February 2021
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Date