

# EMBERTON UNITED CHARITY

England & Wales · Charity number 204221

## Details

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**Other names** EMBERTON UNITED CHARITIES

**Status** Registered

**Legal form** Other

**Registered** 1962-05-28

**Register** [View on the Charity Commission register](#)

## Contact

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**Address** Old Pits  
West Lane  
Emberton  
Olney  
Bucks  
MK46 5DA

**Phone** 01234713174

**Email** [fgevans99@aol.com](mailto:fgevans99@aol.com)

## Activities

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**Objects:** 1) THE PROVISION AND MAINTENANCE OF A VILLAGE HALL FOR USE BY THE INHABITANTS OF THE AREA OF BENEFIT WITHOUT DISTINCTION OF POLITICAL, RELIGIOUS OR OTHER OPINIONS; 2) THE RELIEF OF PERSONS RESIDENT IN THE AREA OF BENEFIT WHO ARE IN NEED, HARDSHIP OR DISTRESS; 3) THE ASSISTANCE OF PEOPLE UNDER THE AGE OF 25 YEARS RESIDENT IN THE AREA OF BENEFIT WHO ARE IN NEED OF FINANCIAL ASSISTANCE AND WHO ARE PREPARING FOR, ENTERING UPON OR ENGAGED IN ANY PROFESSION, TRADE, OCCUPATION OR SERVICE.

**Activities:** Administration of investments of the Emberton United Charities and making educational grants and gifts to the residents of Emberton.

## Classification

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- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Provides Buildings/facilities/open Space
- **What:** General Charitable Purposes, Education/training, Amateur Sport
- **Who:** The General Public/mankind

## Geography

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- **Area of benefit:** ANCIENT PARISH OF EMBERTON
- Milton Keynes

## Finances

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Period end	Income	Expenditure	Assets	Employees
2024-12-31	£38,985	£49,804	-	-
2023-12-31	£44,634	£24,679	-	-
2022-12-31	£20,413	£31,766	-	-
2021-12-31	£46,784	£10,116	-	-
2020-12-31	£45,982	£24,489	-	-

## Trustees

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Name	Role	Appointed
Dr JUDITH ALISON TAYLOR	Chair	2012-04-13
Jacqueline Susan Knight		2026-01-22
Richard Laval		2025-05-22
Stephen Gibson		2026-05-21
WARWICK BRESWORTH CLARKE		

## Linked charities

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- FEOFFEE ESTATE (204221-1)
- MARY HUGHES (204221-2)
- MRS KNIGHT MILLAR (204221-3)

**EMBERTON UNITED CHARITY**

England & Wales - Charity number 204221

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# Accounts

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# EMBERTON UNITED CHARITY

(Incorporated 1999) Reg. Charity No. 204221

## ANNUAL REPORT For the year ended 31 December 2024

### Organisational structure

The Trustees met on seven occasions during the year to consider the management and maintenance of the Charity's property, monitor the financial position and consider any other matters concerning the Charity.

All financial transactions require the signature of two Trustees or officers or on line authorisation.

### Activities

1. Property: Four cottages and the Institute care taker's cottage were fully let during the year. Minor and major repairs and improvements have been carried out as necessary.
2. Land: The tenancy of the fields at Petsoe remained unchanged.
3. Required inspections, servicing and system checks were made.
4. There were no changes to rents during the year.

### Grants and gifts

The value of grants and gifts made during the year were:-

£500 Senior citizens Christmas lunch.

There were no grants to young people for vocational training/education in 2024.

### Accounts

1. Income from hall lettings remained consistent.
1. The value of the Charity's investments and income received remained satisfactory during the year. Cash investments are in recognised charitable funds – COIF and M&G.
2. The Charity received by right seven tenths of the income from the K A H Sams Charitable Fund quarterly. Three tenths was paid to All Saints' parish church.
3. The investment income remained satisfactory during the year. The value of the Charity's investments is shown on the balance sheet.
4. The value of the Charity's buildings and land is shown on the balance sheet.

### Future developments

Plans were further developed, quotations sought and debate continued for refurbishing the interior of the Institute.

### Trustees and officers

Trustees:

Warwick Clarke	All Saints' Church, Emberton nomination.
Judith Taylor	Parish Council nomination (4 year term expiring March 2028)
Susan Soul	Parish Council nomination (4 year term expiring March 2026)
Paul Megeary	Parish Council nomination, declared an intention to step down.
Andy McGrandle	Parish Council nomination (4 year term expiring March 2027)

### The trustees' appointed officers:

Gary Evans	Treasurer
Andrew Harris	Secretary (for all correspondence: 16 Gravel Walk, Emberton, Olney, MK46 5JA)

### Description of trust

The Trust provides and maintains a village hall and care takers cottage.

Maintenance of four cottage to be let at favourable rents to individuals with connections to the village.

Support for any member of the village community considered in "real need" available, on application, from the K.A.H. Sams Charitable Fund.

Financial assistance to residents under 25 years old for vocational education or training.

The Trustees administer seven tenths of the income of the K A H Sams Charitable Fund, which provides "for such charitable purposes for the benefit of the inhabitants of Emberton".

**EMBERTON UNITED CHARITY**

**INCOME AND EXPENDITURE AS AT 31 DECEMBER 2024  
UP TO 31 DECEMBER 2024**

	£	£	£	2023 YEAR	£
<b>PROPERTY INCOME</b>					
Cottages	20,850.00 ✓				20,475.75
Institute	3,483.00 ✓				3,497.25
Land	450.00 ✓				450.00
		24,783.00 ✓			24,423.00
<b>PROPERTY EXPENDITURE</b>					
<b>Hall</b>					
Services	1,388.88 ✓				1,088.98
Telephone	493.94 ✓				450.84
Maintenance	7,535.06 ✓				737.36
Caretakers Commission	803.87 ✓				775.77
<b>Cottages</b>	10,221.75				3,082.95
Repairs/Maintenance	34,363.75 ✓				14,684.65
General					
Insurance	4,439.99 ✓	49,025.49 ✓		4,206.30	21,953.90
			-24,242.49 ✓		2,469.10
<b>PROFIT ON PROPERTY</b>					
<b>OTHER INCOME</b>					
Other	0.00				0.00
K. Sams Memorial Fund	6,202.00 ✓				5,929.00
Millar Charity	2.37 ✓				2.34
Hughes Charity	2.37 ✓				2.34
Rev. Sams Charity	5.95 ✓				5.90
Fee/fee Investment Income	133.69 ✓				131.85
Non specific Investment Income	5,590.30 ✓	14,202.15 ✓		12,697.12	
Interest	2,255.47			1,442.15	20,210.70
<b>OTHER EXPENDITURE</b>					
Insurance & Legal	0.00				89.21
Mortgage	0.00				0.00
Postage stationery and printing	40.37 ✓				64.10
Grants	500.00 ✓				2,370.00
Charities/Gifts	238.81 ✓	779.18 ✓		201.60	2,724.91
			13,422.97 ✓		17,485.79
<b>EXCESS OF INCOME OVER EXPENDITURE</b>					
					£ 19,954.89
					£ 10,819.52 ✓

Independent examiners report to the Trustees of the K A H Sams Charitable Fund and Emberton United Charity.

I report to the Trustees on my examination of the accounts of KAH Sams Charitable Fund and Emberton United Charity for the year ending 31 December 2024

Responsibilities and basis of report.

As the charity Trustees you are responsible for the preparation of the accounts in accordance with the Charities Act 2011.

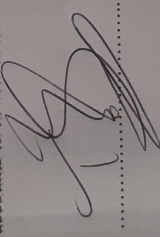
I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5) (b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matter 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.

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.



T G Jones  
8 Talbots Hyde  
Olney  
MK46

09 February 2025

**EMBERTON UNITED CHARITY**

England & Wales - Charity number 204221

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# Accounts

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# **EMBERTON UNITED CHARITY**

**(Incorporated 1999) Reg. Charity No. 204221**

## **ANNUAL REPORT For the year ended 31 December 2021**

### Organisational structure

The Trustees met on seven occasions, some by Zoom, during the year to consider the management and maintenance of the Charity's property, monitor the financial position and consider any other matters concerning the Charity. All financial transactions require the signature of two Trustees or officers or on line authorisation.

### Activities

1. Property: Four cottages and the Institute care taker's cottage were fully let during the year. Minor repairs and improvements have been carried out as necessary. Cottage rents were reviewed but no changes made. Smoke and CO detectors were checked or fitted.
2. Letting of the hall resumed. Risk assessments were carried out.
3. Land: The tenancy of the fields at Petsoe remained unchanged.
4. Required inspections, servicing and system checks were made.

### Grants and gifts

The value of grants and gifts made during the year were:-

£350 Senior citizens Christmas lunch.

£470 (net of some agreed repayments) family support charitable gifts.

The £10k pledged towards the purchase of the village public house was held available.

### Accounts

1. Income from hall lettings remained reduced following pandemic.
2. The value of the Charity's investments and income received remained satisfactory during the year. Cash investments are in recognised charitable funds – COIF and M&G.
3. The Charity received by right seven tenths of the income from the K A H Sams Charitable Fund quarterly. Three tenths was paid to All Saints' parish church.
4. The investment income remained satisfactory during the year. The value of the Charity's investments is shown on the balance sheet.
5. The value of the Charity's buildings and land is shown on the balance sheet.

## Future developments

The 5 year plan was reviewed for a future period.

## Trustees and officers

Trustees:

Warwick Clarke	All Saints' Church, Emberton nomination.
Judith Taylor	Parish Council nomination (4 year term expiring March 2024)
Susan Soul	Parish Council nomination (4 year term expiring March 2022)
Paul Megeary	Parish Council nomination (4 year term expiring March 2025)
Andy McGrandle	Parish Council nomination (4 year term expiring March 2023)

The trustees' appointed officers:

Gary Evans	Treasurer
Andrew Harris	Secretary (for all correspondence: 16 Gravel Walk, Emberton, Olney, MK46 5JA)

## Description of trust

The Trust provides and maintains a village hall.

Support for any member of the village community considered in "real need" available, on application, from the K.A.H. Sams Charitable Fund.

Financial assistance to residents under 25 years for vocational education or training.

The Trustees administer seven tenths of the income of the K A H Sams Charitable Fund, which provides "for such charitable purposes for the benefit of the inhabitants of Emberton".

**EMBERTON UNITED CHARITY**

**BALANCE SHEET AS AT 31 Dec2021  
UP TO 31 DECEMBER 2021**

	£	£	
Balance of United Funds as at 31/12/20/	<b>1,092,160.39</b>		
ADD - Excess of income over expenditure	<u>36,667.91</u>	<b>1,128,828.30</b>	
Loans repaid		<b>-148.00</b>	
Loan written off		<b>-456.00</b>	
			<u>                    </u>
			0.00
		<b>1,128,224.30</b>	
Represented by:			
Treasurer's estimate of value of property and land		<b>942,500.00</b>	
Value of investments		<b>127,689.42</b>	<u>                    </u>
Deposit account		<b>22,426.70</b>	<u>                    </u>
Loans		15.00	
Current account		<b>35,593.18</b>	
		<b>1,128,224.30</b>	

**Independent examiner's report to the Trustees of the K A H Sams Charitable Fund and Emberton United Charity.**

I report to the Trustees on my examination of the accounts of K A H Sams Charitable Fund and Emberton United Charity for the year ending 31 December 2021.

**Responsibilities and basis of report.**

As the charity Trustees of the Trusts you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011.

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 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.

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.

Signed:

Name:

Address:

Date:

1 MAR 2022

THOMAS E JONES A.C.M.A.

8 TALBOTS HYDE

OLNEY

MILTON KEYNES MK46 5UP

**EMBERTON UNITED CHARITY**

England & Wales - Charity number 204221

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# Accounts

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# **EMBERTON UNITED CHARITY**

**(Incorporated 1999) Reg. Charity No. 204221**

## **ANNUAL REPORT For the year ended 31 December 2020**

### Organisational structure

The Trustees met on six occasions, some by Zoom or email, during the year to consider the management and maintenance of the Charity's property, monitor the financial position and consider any other matters concerning the Charity. All financial transactions require the signature of two Trustees or officers or on line authorisation.

There was a change of one trustee as reported below. Secretary and treasurer remained in office as the previous year (2019).

### Activities

1. Property: Four cottages and the Institute care taker's cottage were fully let during the year. Minor repairs and improvements have been carried out as necessary. Cottage rents were reviewed but no changes made. Smoke and CO detectors were checked or fitted. Updating of the bath room at 4 High Street to provide a walk in shower in place of the bath was carried out. A structural survey of part of exterior stone walling was carried out to confirm its stability. New replacement double glazed windows were installed in cottages 2 Olney Road and 2,4,6 High Street.
2. Letting of the hall was suspended in compliance with pandemic regulations. Risk assessments were carried out.
3. Land: The tenancy of the fields at Petsoe remained unchanged.
4. Required inspections, servicing and system checks were made.

### Grants and gifts

The value of grants and gifts made during the year were:-

£350 Senior citizens Christmas lunch.

£750 Educational grants.

£2,349 Family support charitable gifts.

The Charity agreed to administer a temporary pandemic hardship fund on behalf of the Parish Council.

(A pledge of £10k was made to the community group towards the planned purchase of the village public house)

## Accounts

1. Income from hall lettings seriously diminished by the pandemic. £10k in financial support was received from Milton Keynes Council. An average of normal income was paid to the Institute caretaker.
2. The value of the Charity's investments and income received remained satisfactory during the year. Cash investments are in recognised charitable funds – COIF and M&G.
3. The Charity received by right seven tenths of the income from the K A H Sams Charitable Fund quarterly. Three tenths was paid to All Saints' parish church.
4. The investment income remained satisfactory during the year. The value of the Charity's investments is shown on the balance sheet.
5. The value of the Charity's buildings and land is shown on the balance sheet.

## Future developments

The 5 year plan was reviewed for a future period.

## Trustees and officers

Trustees:

Gerald Mann	Retired after 60 years as a trustee. (A party was held)
Warwick Clarke	All Saints' Church, Emberton nomination.
Judith Taylor	Parish Council nomination (4 year term expiring March 2024)
Susan Soul	Parish Council nomination (4 year term expiring March 2022)
Paul Megeary	Parish Council nomination (4 year term expiring March 2025)
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2. the accounts do not accord with those records.

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Signed:

Name:

Address:

Date:

04.03.21 THOMAS G JONES

8 TALBOT'S HOPE

OLNEY

MILTON KEYNES

MH46 5NP