

# Lord Petre & Puckle Charities

England & Wales · Charity number 207227

## Details

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Other names	LORD PETRE, LORD PETRE & PUCKLE AND OTHER CHARITIES, LORD PETRE AND OTHER CHARITIES
Status	Registered
Legal form	Other
Registered	1962-09-22
Register	<a href="#">View on the Charity Commission register</a>

## Contact

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Address	Ashleigh Laindon Common Road Little Burstead Billericay Essex
Phone	01277654501
Email	<a href="mailto:peter_j_strong@hotmail.com">peter_j_strong@hotmail.com</a>

## Activities

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**Objects:** FOR THE BENEFIT OF THE ALMSPEOPLE OF THE CHARITY OR ANY OF THEM IN SUCH MANNER AS THE TRUSTEES THINK FIT FROM TIME TO TIME

**Activities:** The provision of economical housing for rent in the form of 3No. bungalows with gardens and car parking spaces. Retired applicants need to reside in the Billericay District or have relatives who live in this area. The Charity pays for most of the utilities and garden upkeep.

## Classification

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- **How:** Provides Buildings/facilities/open Space
- **What:** General Charitable Purposes, Accommodation/housing
- **Who:** Elderly/old People, People With Disabilities

## Geography

- **Area of benefit:** ANCIENT PARISH OF GREAT BURSTEAD
- Essex

## Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£23,151	£17,499	-	-
2023-12-31	£60,397	£56,884	-	-
2022-12-31	£18,327	£10,520	-	-
2021-12-31	£14,417	£13,243	-	-
2020-12-31	£15,127	£7,270	-	-

## Trustees

Name	Role	Appointed
David Clark	Chair	2017-06-13
DANIEL MARK LAWRENCE		2019-05-01
PETER JOHN STRONG		1991-05-17
PHILIP MICHAEL GINN		2013-07-31
REV MICHAEL ALAN HALL		2014-05-14
STEPHEN WALLIS		2013-11-13
Sarah Kettle		2025-08-01

## Linked charities

- THOMAS BLATCH (207227-1)
- DR JOHN JENNER (207227-2)
- JAMES CHAPLAIN (207227-3)
- POOR'S FIELD OR TYE MEAD (207227-4)
- JOHN PUCKLE FOR THE POOR (207227-5)

**Lord Petre & Puckle Charities**

England & Wales - Charity number 207227

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# Accounts

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**LORD PETRE & PUCKLE CHARITIES**

**FINANCIAL ACCOUNTS**

**31st December 2023**

Charity No. 207227

M.N. Sinclair, FCA  
Field Cottage  
New Road  
Ingatstone  
Essex CM4 0HH

# **LORD PETRE & PUCKLE CHARITIES**

**31st December 2023**

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## LORD PETRE & PUCKLE CHARITIES

### SCHEDULE OF TRUSTEES AS AT 31ST DECEMBER 2023

Mr Mike Ginn  
49 Station Road  
Billericay, CM12 9DR  
Tel: 01277 654882

[michael@theginns.com](mailto:michael@theginns.com)

Mr. David Clark  
Ashleigh  
Laindon Common Road  
Little Burstead CM12 9TD  
Tel: 01277 655232

[davidatashleigh@btinternet.com](mailto:davidatashleigh@btinternet.com)

Mrs Kate Drage  
Belmont  
Broomhills Chase  
Little Burstead, CM12 9TG  
Tel: 01277 625231

[katedrage@gmail.com](mailto:katedrage@gmail.com)

Rev. Michael Hall  
Great Burstead Vicarage  
111 Church Street  
Billericay, CM11 2TR  
Tel: 01277 632060

[revd.michael@btinternet.com](mailto:revd.michael@btinternet.com)

Mr Peter J. Strong  
Ivy Cottage  
Laindon Common Road  
Little Burstead  
Billericay, CM12 9TB  
Tel: 01277 654501

[peter\\_j\\_strong@hotmail.com](mailto:peter_j_strong@hotmail.com)

Mr Stephen Wallis  
2A St John's Road  
Billericay, CM11 1AB  
Tel: 01277 658783

[sww635@gmail.com](mailto:sww635@gmail.com)

Mr Daniel M. Lawrence  
40 Langham Crescent  
Billericay, CM12 9RB

[dannylawrence@gateway978.com](mailto:dannylawrence@gateway978.com)

(Total number of Trustees under the Trust Deed 7 no.)

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES**  
**OF LORD PETRE & PUCKLE CHARITIES**

I report on the accounts of the Trust for the year ended 31<sup>st</sup> December 2023, which are set out on pages 3 and 4.

**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(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- to state whether particular matters have come to my attention.

**Basis of independent examiner's report**

My examination was carried out in accordance with the 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 you as 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 matter has come to my attention:

(1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with section 130 of the 2011 Act; and

- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

have not been met; or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Name: Michael Nathan Sinclair

Relevant professional qualification or body: Chartered Accountant (retired)

Address: Field Cottage, New Road, Ingatestone, Essex CM4 0HH

## LORD PETRE & PUCKLE CHARITIES

### BALANCE SHEET At 31st December 2023

	<u>2023</u>		<u>2022</u>	
	£	£	£	£
<b><u>BALANCES AT BANK</u></b>				
Barclays Current Account	26,863		12,073	
Barclays Deposit Account	<u>-</u>		<u>11,277</u>	
		<u>26,863</u>		<u>23,350</u>
<b><u>ACCUMULATED RESERVES</u></b>				
Balance at 31/12/21		23,350		25,543
(Deficit)/Surplus for the Year		<u>3,513</u>		<u>(2,193)</u>
		<u>26,863</u>		<u>23,350</u>

#### NOTES

1. The Charity owns various assets including Alms Houses in Little Burstead, Essex, the estimated value of which was in excess of £300,000 at 31st December 2023.
2. The Charity had the following Shareholding in the COIF Charities Ethical Investment Fund at December 2023.

23,671.84 units in the Accumulation Fund valued at £120,155 (Non-Dividend Bearing)  
4,463.48 units in the Income Fund valued at £13,435 (Dividend Bearing)

- 3 The Charity has spent £45,093 on the purchase and installation of solar panels which has been funded in part by an interest free loan from the Almshouse Association of £40,000, which remains outstanding. Neither the asset nor liability are reflected in the Balance Sheet above.

**LORD PETRE & PUCKLE CHARITIES**

**RECEIPTS AND PAYMENTS ACCOUNT**  
**FOR THE YEAR ENDED 31ST DECEMBER 2023**


	<b><u>2023</u></b>		<b><u>2022</u></b>	
	£	£	£	£
<b><u>RECEIPTS</u></b>				
Rent and Maintenance Contributions		19,062		17,454
Rent of Field		600		600
		<u>19,662</u>		<u>18,054</u>
 <b><u>SUNDRY RECEIPTS</u></b>				
Dividends	384		260	
Bank Interest	76		13	
Sundry Donations	275		-	
Almshouse Association Loan	40,000		-	
		<u>40,735</u>		<u>273</u>
<b><u>TOTAL RECEIPTS</u></b>		<b><u>60,397</u></b>		<b><u>18,327</u></b>
 <b><u>PAYMENTS</u></b>				
Maintenance and Decorating	5,606		2,298	
Subscriptions	530		570	
Insurance	1,650		-	
Electricity	2,019		5,971	
Water Rates	1,462		1,348	
Accountancy	285		275	
General Expenses	239		58	
Legal Expenses	-		-	
Solar Panels	45,093		-	
		<u>56,884</u>		<u>10,520</u>
 <b><u>INVESTMENT PURCHASES</u></b>				
Investment in Charities Ethincal Investment Fund		<u>-</u>		<u>10,000</u>
<b><u>TOTAL PAYMENTS</u></b>		<b>56,884</b>		<b>20,520</b>
<b><u>(DEFICIT)/SURPLUS FOR THE YEAR</u></b>		<b><u>3,513</u></b>		<b><u>(2,193)</u></b>

**LORD PETRE & PUCKLE CHARITIES**

**FINANCIAL ACCOUNTS**

**FOR THE YEAR ENDED 31ST DECEMBER 2023**

We hereby certify that the attached accounts are true and correct to the best of our knowledge and belief.

Dated 27-09-2024 Signed  TRUSTEE

Dated 27-09-2024 Signed  TRUSTEE

**LORD PETRE'S CHARITY**

**BALANCE SHEET**

**AT 31ST DECEMBER 2023**

	<b><u>2023</u></b>		<b><u>2022</u></b>	
	£	£	£	£
<b><u>BALANCES AT BANK</u></b>				
Barclays Current Account	26,863		12,073	
Barclays Deposit Account	<u>-</u>		<u>11,277</u>	
<b><u>NET BANK POSITION</u></b>		<b><u>26,863</u></b>		<b><u>23,350</u></b>
 <b><u>ACCUMULATED RESERVES</u></b>				
Balance at 31/12/22		23,350		25,543
Surplus/(Deficit) for the Year		<u>3,513</u>		<u>(2,193)</u>
		<b><u>£26,863</u></b>		<b><u>£23,350</u></b>

**NOTES**

1. The Charity owns various assets including Alms Houses in Little Burstead, Essex, the estimated value of which was in excess of £300,000 at 31st December 2022, and investments in the Charities Ethical Investment Fund.
2. The Charity has spent £45,093 on the purchase and installation of solar panels which has been funded in part by an interest free loan from the Almshouse Association of £40,000, which remains outstanding. Neither of these amounts are reflected in the Balance Sheet above.

**LORD PETRE'S CHARITY**

**RECEIPTS AND PAYMENTS ACCOUNT**  
**FOR THE YEAR ENDED 31ST DECEMBER 2023**

	<b><u>2023</u></b>		<b><u>2022</u></b>	
	£	£	£	£
<b><u>RECEIPTS</u></b>				
Rent and Maintenance Contributions		19,062		17,454
Rent of Field		600		600
		<u>19,662</u>		<u>18,054</u>
 <b><u>SUNDRY RECEIPTS</u></b>				
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Almshouse Association Loan	40,000		-	
		<u>40,735</u>		<u>273</u>
		60,397		18,327
 <b><u>PAYMENTS</u></b>				
Maintenance and Decorating	5,606		2,298	
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Insurance	1,650		-	
Electricity	2,019		5,971	
Water Rates	1,462		1,348	
Accountancy	285		275	
General Expenses	239		58	
Solar Panels	45,093		-	
		<u>56,884</u>		<u>10,520</u>
 <b><u>INVESTMENT PURCHASES</u></b>				
Investment in Charities Ethical Investment Fund	-		10,000	
 <b><u>TOTAL PAYMENTS</u></b>				
		<u>56,884</u>		<u>20,520</u>
 <b><u>SURPLUS/(DEFICIT) FOR THE YEAR</u></b>				
		<u>3,513</u>		<u>(2,193)</u>