



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	1	November	Year2023		Day31	October	Year2024

Section A Reference and administration details

Charity name

Reverend Francis Wheeler's Charity

Other names charity is known by

Registered charity number (if any)

216751

Charity's principal address

1 The Croft

Bridgnorth

Postcode WV15 5AE

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Iain Seivewright			Other trustees
2	David Oxtoby			Other trustees
3	Catherine Wilson			Other Trustees
4	David Walker			Other Trustees
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
Iain Seivewright	
David Oxtoby	
Catherine Wilson	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

--

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Trust deed
How the charity is constituted (eg. trust, association, company)	trust
Trustee selection methods (eg. appointed by, elected by)	Appointed by other trustees

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

--

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

15. Management and letting of lands. - The Trustees shall let and otherwise manage all the lands belonging to the Charity not required to be retained or occupied for the purposes thereof. The Trustees shall not without the sanction of the Commissioners or a competent court create any tenancy wholly or partly in consideration of a fine or for a term ending more than 22 years after it is granted or for less than the best rent obtainable.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

16. Leases. - The Trustees shall provide that on the grant by them of any lease the lessee shall execute a counterpart thereof. Every lease shall contain covenants on the part of the lessee for the payment of rent, the proper cultivation of the land and all other usual and proper covenants applicable to the property comprised therein and a proviso for re-entry on non-payment of the rent or non-performance of the covenants.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

Managing charity when clerk retired after many years of service. This has led to delays in several areas (e.g. changing trustees; changing signatures at bank, etc)

Section E

Financial review

Brief statement of the charity's policy on reserves

17. Expenses of management. - The Trustees shall first defray out of the income of the Charity the cost of repairs and insurance and all other charges and outgoings payable in respect of the property of the Charity and all the proper costs, charges and expenses of and incidental to the administration and management of the Charity.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Section F

Other optional information

Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Iain Seivewright	
Position (eg Secretary, Chair, etc)	Chair	
Date	04/09/25	



Section A

Independent Examiner's Report

Report to the trustees

Charity Name
Rev Francis Wheeler's Charity

On accounts for the year
ended

31st October 2024

Charity no
(if any)

216751

Set out on pages

(remember to include the page numbers of additional sheets)

Responsibilities and
basis of report

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31/10/2024**

As the charity's trustees, 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 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

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. *Delete [] if not applicable.*

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities 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.

** Please delete the words in the brackets if they do not apply.*

Signed:

Date: 31/08/2025

Name:

Vanessa Naomi Voysey

Relevant professional

AAT 3

qualification(s) or body
(if any):

--

Address:

12 Greenleys Crescent
Alveley
Shropshire, WV15 6PG

Section B

Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

--

REV. FRANCIS WHEELER'S CHARITY

Registered Charity No. 216751

STATEMENT OF ACCOUNT

FOR YEAR TO 31st OCTOBER 2023

**WILLIAMS & CO
SOLICITORS
29 EAST CASTLE STREET
BRIDGNORTH
SHROPSHIRE
WV16 4AN**

REV. FRANCIS WHEELER'S CHARITY – Registered Charity No. 216751

<u>2022</u>	<u>RECEIPTS</u> (Restricted Funds)	<u>CAPITAL</u>	<u>INCOME</u>	<u>TOTAL</u>
Nov 01	Balance in hand brought forward: -			
	HSBC Bank Plc: Treasurers Account	1,098.10		
	COIF Deposit Account	594.09		
	Williams & Co – Client Account	<u>25,562.00</u>		27,254.19
Nov 30	COIF – Income Shares dividend		48.76	
<u>2023</u>				
Jan 01	COIF – December Deposit Account Interest		3.81	
Feb 28	COIF – Income Shares Dividend		48.83	
Apr 01	COIF – Quarterly Deposit Account Interest		5.34	
Apr 21	Bridgnorth Town Council – Rent for Severn Park – Half year to 24/03/23		12,751.00	
May 31	COIF – Income Shares Dividend		48.09	
Jul 01	COIF – Quarterly Deposit Account interest		6.34	
Aug 31	COIF – Income Shares Dividend		48.09	
Oct 01	COIF – Quarterly Deposit Account Interest		7.60	
Oct 13	Western Power Distribution – Electricity Wayleave payment		16.75	
Oct 19	Bridgnorth Town Council – Rent for Severn Park – Half year to 29/09/23		12,751.00	25,735.61
				<u>£52,989.80</u>

2022 PAYMENTS (Restricted Funds)

Dec 02	D E Williams – Clerks Salary - year to 31/10/21	— 550.00
Dec 05	PCC for Parish of St. Mary's and St. Leonard's, Bridgnorth	16,250.00
	The Broseley Wood Charity	— 250.00
	The Bridgnorth Parish Charity	— 6,750.00

2023

Jan 25	Parochial Church Council for Parish of St. Giles, Maisemore	— 1,750.00
Feb 21	D E Williams – Clerks Salary – year to 31/10/22	— 550.00
Oct 09	Stanton Ralph – Accountants fee for Independent Examiners Report	— 480.00
Oct 31	HSBC Bank Plc – Monthly account charge from November 2022	— 61.20

2023

Oct 31	Balance in hand carried forward: -	
	HSBC Bank Plc – Treasurers Account	— 697.42
	COIF Deposit Account	— 617.18
	Williams & Co – Client Account	— 25,034.00
		—
		£52,989.80
		—