



# Trustees' Annual Report

for the period

From (start date) **010721** to (end date) **300622**

## Section A

## Reference and administration details

Charity name **FRANCISCAN TRIARS of the ATONEMENT**

Other names the charity is known by **—**

Registered charity number (if any) **231951**

Charity's principal address  
**FLAT 4**  
**21 PARK ROAD**  
**BECKENHAM**  
 Postcode **BR3 1QG**

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	<b>DENIS BURGELIN, SA</b>			
2	<b>Managing</b>	<b>Trustee</b>		
3				
4				
5	<b>BRIAN TERRY, SA</b>			
6	<b>Fraternity's Minister General</b>			
7				
8				
9	<b>JAMES LOUGHRAN, SA</b>			
10	<b>Fraternity's Vicar General</b>			
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
<b>JAMES PUGLISI, SA</b>	
<b>ROBERT MERCER, SA</b>	

## Section A

## Reference and administration details (continued)

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)

RULES / CONSTITUTIONS

How the charity is constituted  
(eg trust, association, company)

Roman Catholic Religious Institute

Trustee selection methods  
(eg appointed by, elected by)

Appointed by

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.

Our Charity supports the British presence and charitable works of the Franciscan Friars of the Atonement in England.

The Franciscan Friars of the Atonement is an international Roman Catholic Religious Institute whose headquarter is in the United States and who is currently led by the Very Rev. Fr. Brian Terry, SA

**Section C****Objectives and activities**

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

- General charitable purposes
- Religious activities
- Medico-social work

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)

- Sacramental ministry.
- NHS Medical practice

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**

Summary of the main achievements of the charity during the year

- NHS Medical practice
- Spiritual care in a Roman Catholic organization outside of other than the Charity itself.

**Section E****Financial review**

Brief statement of the charity's policy on reserves

No Particular policy.

Details of any funds materially in deficit

No debt  
No deficit

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**

Charity's finances regularly reviewed by the Institute's Finance Office and Leadership.

**Section G****Declaration**

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

Signed on behalf of the charity's trustees

Signature(s)

Denis Burgerlin, SA

Full name(s)

DENIS BURGERLIN, SA

Position (eg Secretary, Chair, etc)

MANAGING TRUSTEE

Date

22 04 23



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Independent examiner's report  
on the accounts

Section A

Independent Examiner's Report

Report to the  
trustees/directors/  
members of

Charity Name

FRANCISCAN FRIARS OF THE ATONEMENT

On accounts for the year  
ended

30/06/2022

Charity no.:

231951

Company no.:

Set out on pages

IER 1 & 2

(remember to include the page numbers of additional sheets)

I report to the charity trustees on my examination of the accounts of the Company for the year ended DD/MM/YYYY.

Responsibilities and  
basis of report

As the charity's trustees of the Company (who are also the directors of the company for the purposes of company law), you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ("the 2006 Act").

Having satisfied myself that the accounts of the Company are not required to be audited for this year under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ("the 2011 Act"). In carrying out my examination, I have followed the Directions given by the Charity Commission (under section 145(5)(b) of the 2011 Act).

Independent  
examiner's statement

[The company'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 (other than that disclosed below \*) which gives me cause to believe that:

- accounting records were not kept in accordance with section 386 of the Companies Act 2006; or
- the accounts do not accord with such records; or
- the accounts do not comply with relevant accounting requirements under section 396 of the Companies Act 2006 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; or
- the accounts have not been prepared in accordance with the Charities SORP (FRS102).

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: N. Keith Raffan Date:                     

Name: RICHARD KEITH RAFFAN FCA

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

Address: RAFFAN & GOLDING  
Chartered Accountants & Chartered Tax Advisers

## 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.





CHARITY COMMISSION  
FOR ENGLAND AND WALES

Charity Name Franciscan Friars of the Atonement No of any 231951

## Receipts and payments accounts

CC16a

For the period from 01/07/21 ~~2021~~ To 30/06/22 Period start date Period end date

### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
<u>DONATIONS</u>	<u>55308</u> -	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b> (Gross income for AR)	<u>55308</u> -	-	-	-	-
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total receipts</b>	<u>55308</u> -	-	-	-	-
<b>A3 Payments</b>					
<u>RENT TELEPHONE</u>	-	-	-	-	-
<u>SUBSISTENCE</u>	<u>56693</u> -	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<u>56693</u> -	-	-	-	-
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
<b>Sub total</b>	<u>56693</u> -	-	-	-	-
<b>Total payments</b>	<u>56693</u> -	-	-	-	-
<b>Net of receipts/(payments)</b>	<u>(1385)</u> -	-	-	-	-
<b>A5 Transfers between funds</b>	-	-	-	-	-
<b>A6 Cash funds last year end</b>	<u>160645</u> -	-	-	-	-
<b>Cash funds this year end</b>	<u>159260</u> -	-	-	-	-

## Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	BANK ACCOUNTS	159260 -	-	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	159260 -	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature

Denis BURGELIN, SA

Print Name

DENIS BURGELIN

Date of approval

25/04/23