



# Trustees' Annual Report

for the period

From (start date) 010722 to (end date) 300623

## Section A Reference and administration details

Charity name FRANCISCAN FRIARS 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  | DENIS BURGELIN, SA            |                 |                                   |   |
| 2  | Managing Trustee              |                 |                                   |   |
| 3  |                               |                 |                                   |   |
| 4  |                               |                 |                                   |   |
| 5  | BRIAN TERRY, SA               |                 |                                   |   |
| 6  | Fraternity's Minister General |                 |                                   |   |
| 7  |                               |                 |                                   |   |
| 8  |                               |                 |                                   |   |
| 9  | JAMES LOUGHRAN, SA            |                 |                                   |   |
| 10 | Fraternity's Vicar General    |                 |                                   |   |
| 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 |
|-------------------|-----------------------------------|
| JAMES PUGLISI, SA |                                   |
| ROBERT HERCER, SA |                                   |

## 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 the United Kingdom.

The Franciscan Friars of the Atonement is an international Roman Catholic Religious Institute whose headquarters 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)

- Pastoral 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 work
- Spiritual / Pastoral care in a Roman Catholic organization outside / 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 Burgelin, SA

Full name(s)

DENIS BURGELIN, SA

Position (eg Secretary, Chair, etc)

MANAGING TRUSTEE

Date

020424



CHARITY COMMISSION  
FOR ENGLAND AND WALES

FRANCISCAN Friars of the Atonement 231951

## Receipts and payments accounts

CC16a

|                        |                               |    |                               |
|------------------------|-------------------------------|----|-------------------------------|
| For the period<br>from | Period start date<br>01/07/22 | To | Period end date<br>30/06/2023 |
|------------------------|-------------------------------|----|-------------------------------|

### Section A Receipts and payments

|   | Unrestricted<br>funds<br>to the nearest<br>£ | Restricted<br>funds<br>to the nearest £ | Endowment<br>funds<br>to the nearest £ | Total funds<br>to the nearest £ | Last year<br>to the nearest £ |
|---|--|---|--|---------------------------------|-------------------------------|
| <b>A1 Receipts</b>  |  |   |  |                                 |                               |
| DONATIONS   | 37394 -                                      | -                                       | -                                      | -                               | -                             |
| INTEREST  | 641 -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
| <b>Sub total (Gross income for AR)</b>                    | 38035 -                                      | -                                       | -                                      | -                               | -                             |
| <b>A2 Asset and investment sales,<br/>(see table).</b>    |  |   |  |                                 |                               |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b>  | -  | -                                       | -                                      | -                               | -                             |
| <b>Total receipts</b>                                     | 38035 -                                      | -                                       | -                                      | -                               | -                             |
| <b>A3 Payments</b>  |  |   |  |                                 |                               |
| RENT TELEPHONE  | -  | -                                       | -                                      | -                               | -                             |
| SUBSISTENCE   | 40813 -                                      | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b>  | 40813 -                                      | -                                       | -                                      | -                               | -                             |
| <b>A4 Asset and investment<br/>purchases, (see table)</b> |  |   |  |                                 |                               |
|   | -  | -                                       | -                                      | -                               | -                             |
|   | -  | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b>  | -  | -                                       | -                                      | -                               | -                             |
| <b>Total payments</b>                                     | 40813 -                                      | -                                       | -                                      | -                               | -                             |
| <b>Net of receipts/(payments)</b>                         | (2778) -                                     | -                                       | -                                      | -                               | -                             |
| <b>A5 Transfers between funds</b>                         |  |   |  |                                 |                               |
| <b>A6 Cash funds last year end</b>                        | 159260 -                                     | -                                       | -                                      | -                               | -                             |
| <b>Cash funds this year end</b>                           | 156482 -                                     | -                                       | -                                      | -                               | -                             |



## 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  | 156482-                         | -                             | -                            |
|  |  | -                               | -                             | -                            |
|  |  | -                               | -                             | -                            |
|  | <b>Total cash funds</b>                                | 156482-                         | -                             | -                            |
|  | (agree balances with receipts and payments account(s)) |                                 |                               |                              |
|  |  | Unrestricted funds to nearest £ | Restricted funds to nearest £ | Endowment funds to nearest £ |
| B2 Other monetary assets                     |  | -                               | -                             | -                            |
|  |  | -                               | -                             | -                            |
|  |  | -                               | -                             | -                            |
|  |  | -                               | -                             | -                            |
|  |  | -                               | -                             | -                            |
|  |  | -                               | -                             | -                            |
|  |  | -                               | -                             | -                            |
| B3 Investment assets                         |  | Fund to which asset belongs     | Cost (optional)               | Current value (optional)     |
|  |  |                                 | -                             | -                            |
|  |  |                                 | -                             | -                            |
|  |  |                                 | -                             | -                            |
|  |  |                                 | -                             | -                            |
|  |  |                                 | -                             | -                            |
| B4 Assets retained for the charity's own use |  | Fund to which asset belongs     | Cost (optional)               | Current value (optional)     |
|  | CAR  | 15000                           | -                             | -                            |
|  |  |                                 | -                             | -                            |
|  |  |                                 | -                             | -                            |
|  |  |                                 | -                             | -                            |
|  |  |                                 | -                             | -                            |
|  |  |                                 | -                             | -                            |
|  |  |                                 | -                             | -                            |
|  |  |                                 | -                             | -                            |
| B5 Liabilities                               |  | Fund to which liability relates | Amount due (optional)         | When due (optional)          |
|  |  |                                 | -                             |                              |
|  |  |                                 | -                             |                              |
|  |  |                                 | -                             |                              |
|  |  |                                 | -                             |                              |
|  |  |                                 | -                             |                              |

  

|   |                    |                 |                  |
|---|--------------------|-----------------|------------------|
| Signed by one or two trustees on behalf of all the trustees | Signature          | Print Name      | Date of approval |
|   | Denis Bugelein, SA | DENIS BURGELEIN | 04/04/2024       |



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

30/06/2023

Charity no.:

231951

Company no.:

Set out on pages

IER 1 x 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 30/06/2023

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: R. Keith Raffan Date: 04/04/2024

Name: RICHARD KEITH RAFFAN FCA

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

Chartered Accountant

Address:

Raffan and Golding  
Chartered Accountants and Chartered Tax Advisers  
2nd Floor, 17 Short's Gardens, London WC2H 9AT

## 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.