

# THOMPSON PRITCHARD TRUST

England & Wales · Charity number 234601

## Details

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**Status** Registered

**Legal form** Other

**Registered** 1964-06-19

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

## Contact

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**Address** 8 Woodhouse Lane  
Priorslee  
Telford  
TF2 9SX

**Phone** 01743 241281

**Email** [secretary@shropshirewelfaretrust.org](mailto:secretary@shropshirewelfaretrust.org)

**Website** [www.shropshirewelfaretrust.org](http://www.shropshirewelfaretrust.org)

## Activities

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**Objects:** 1. PROVIDING CONVALESCENT TREATMENT FOR POOR PATIENTS FROM ROYAL SALOP INFIRMARY OR PERSONS IN OTHER CONVALESCENT HOMES OR INSTITUTIONS WHICH PROVIDE CONVALESCENT TREATMENT FOR POOR PERSONS. 2. FOR THE GENERAL BENEFIT OF SICK POOR PERSONS IN THE COUNTY OF SALOP

**Activities:** Applying the income of the Charity in or towards providing convalescent treatment for poor patients on their being discharged from a Shropshire hospital or for other poor patients in any convalescent home or any institution. Applying the same for the benefit of sick and poor patients resident in Shropshire as the Trustees in their discretion think fit.

## Classification

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- **How:** Makes Grants To Individuals
- **What:** The Advancement Of Health Or Saving Of Lives, Disability
- **Who:** Other Defined Groups

## Geography

- Area of benefit: SALOP
- Shropshire

## Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£36,927	£33,376	-	-
2023-12-31	£33,879	£37,609	-	-
2022-12-31	£30,892	£50,259	-	-
2021-12-31	£51,396	£44,134	-	-
2020-12-31	£14,338	£28,553	-	-

## Trustees

Name	Role	Appointed
EMMA KIDSON	Chair	
DAVID ROBERT STACEY		2020-10-29
Dr David Northern		2016-03-16
Dr Ellen Mary Nolan		2023-11-30
Dr JONATHAN BEACH		
Dr John Sutton		2016-03-16
Dr Louise Mary Claire Davies		2025-04-10
Dr Peter Bottomley		2018-04-17
JUDITH WILLIAMS		

## Linked charities

- THOMPSON PRITCHARD SAMARITAN FUND (234601-1)

**THOMPSON PRITCHARD TRUST**

England & Wales - Charity number 234601

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# Accounts

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**THOMPSON PRITCHARD TRUST  
REGISTERED CHARITY NUMBER 234601**

**STATEMENT OF ACCOUNTS  
FOR THE YEAR ENDED 31 DECEMBER 2024**

**WR PARTNERS  
CHARTERED ACCOUNTANTS  
BELMONT HOUSE  
SHREWSBURY BUSINESS PARK  
SHREWSBURY  
SHROPSHIRE  
SY2 6LG**

**INDEPENDENT EXAMINER'S REPORT ON THE UNAUDITED ACCOUNTS OF  
THOMPSON PRITCHARD TRUST  
FOR THE YEAR ENDED 31 DECEMBER 2024**

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**Independent examiner's report to the Trustees of Thompson Pritchard Trust ('the Charity')**

I report to the Charity Trustees on my examination of the accounts of the Charity for the year ended 31 December 2024 which are set out on pages 1 to 6.

This report is made solely to the Charity's Trustees, as a body, in accordance with section 145 of the Charities Act 2011 and regulations made under section 154 of that Act. My work has been undertaken so that I might state to the Charity's Trustees those matters I am required to state to them in an independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Charity and the Charity's Trustees as a body for my work or for this report.

**Responsibility and basis of report**

As the Trustees of the Charity you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the 2011 Act').

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

**Independent examiner's statement**

I have completed my examination. I confirm that no 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 Charity as required by section 130 of the 2011 Act; or
2. the accounts do not accord with those records; or
3. the accounts do 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

  
Tim Lunt  
**WR Partners**  
Chartered Accountants  
Belmont House  
Shrewsbury Business Park  
Shrewsbury  
SY2 6LG

BA FCCA MTPI

Dated 01/05/2025

**THOMPSON PRITCHARD TRUST**

**TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2024**

**CHARITY REGISTERED NUMBER 234601**

**TRUSTEES**

Mrs E Kidson (Chairman)  
Dr J Beach  
Mrs J Williams (Vice Chairman)  
Mrs L Gill (Resigned in Year)  
Dr S Sutton (Treasurer)  
Dr D Northern (Joint Secretary)  
Dr P Bottomley (Joint Secretary)  
Mr D Stacey  
Dr E Nolan (Joint Secretary)  
Mrs S Clesham (Resigned in Year)

**ACCOUNTANTS**

WR Partners  
Belmont House  
Shrewsbury Business Park  
Shrewsbury  
Shropshire  
SY2 6LG

**SOLICITORS**

Wace Morgan  
21 St Mary's Street  
Shrewsbury  
Shropshire

**BANKERS**

CAF Bank

**ADDRESS FOR  
CORRESPONDENCE**

Dr D Northern  
3 Woodhouse Lane  
Priorslee  
Telford  
TF2 9SX

## THOMPSON PRITCHARD TRUST

### TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2024

#### STRUCTURE, GOVERNANCE & MANAGEMENT

##### **a) Constitution**

The Thompson Pritchard Trust was constituted by a Trust Deed dated 6 April 1939, founded by the Will of Annie Louise Pritchard and comprised in a scheme dated 12 October 1956. The Charity's registered number is 234601.

##### **b) Method of appointment of Trustees**

Trustees are appointed by the Committee at the Annual Meeting each year. Trustees can be co-opted at any time during the year.

##### **c) Risk management**

The Trustees have assessed the major risks to which the Charity is exposed and are satisfied that systems are in place to mitigate the exposure to the major risks.

The Trustees consider the Charity to be well positioned to manage the current situation and secure operations into the future.

## THOMPSON PRITCHARD TRUST

### TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2024

#### OBJECTIVES & ACTIVITIES

##### **a) Policies and objectives**

To apply the income thereof in or towards providing convalescent treatment for poor patients on their being discharged from the Royal Shrewsbury Infirmary or for other persons in any Convalescent Home for the time being provided by the Trustees or in any Institution which provides convalescent treatment for poor persons as the said Trustees shall in their discretion think fit.

In so far as the Trustees are unable to apply the clear income for this purpose they may apply the same as they think fit for the benefit of either the sick poor of Shropshire generally or of such sick poor persons resident therein as they select and in particular but without prejudice to the generality of the foregoing in one or more of the following ways:

- 1 The supply of bedding, comforts, food fuel and medical and other aids.
- 2 Grants for the benefits of persons who are sick, infirm, convalescent or in need of rest or change of air to defray the expenses of recuperative holidays or of obtaining domestic help.
- 3 The donation of money in aid of the funds of any convalescent home or other institution or organisation established or to be established for the care and relief of sick persons upon the terms which will ensure that the benefit of the institution or organisation are available for the sick poor of Shropshire.

##### **b) Activities for achieving objectives**

The Charity is listed in relevant Charity directories and the information kept up to date. Many applications are made by way of information from the directories.

The secretaries regularly inform and remind relevant agencies (Citizens' Advice, Doctors' surgeries, local hospitals, hospices) in Shropshire and Telford and Wrekin of the Charity's existence and its objectives.

Trustees bring to the Charity's notice cases from their own areas, both geographical and professional. All areas of the county are covered geographically. Professional expertise comes from the Church, the County Council, the medical profession as well as members of the general public.

When a significant donation is received or made press coverage is taken in the local papers.

In shaping the objectives and planning the activities for the year, the Trustees have considered the Charity Commission's Guidance on Public Benefit.

**THOMPSON PRITCHARD TRUST**

**TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2024**

**ACHIEVEMENTS & PERFORMANCE**

**a) Review of activities**

The Trust has continued to make its existence known by developing contacts with agencies and care services aware of people in need of help. Details of the Charity are included in publications of charitable trusts. The Secretaries' links with the medical profession are invaluable and they are able to liaise closely with GPs and associations such as Nurses Leagues. All applications for help are carefully investigated and screened, Trustees making personal assessment visits and submitting confidential reports as the need arises. Those applications that do not fill the criteria are refused. Some are referred to other Charitable Trusts.

**FINANCIAL REVIEW**

**a) Reserves policy**

The Trustees invest reserves not required for short term purposes to produce further investment income. This is the Charity's main source of income. Four Custodian Trustees are appointed to review the Charity's investments twice yearly and they report back to the Committee of Trustees. The investments are managed by stockbrokers and are held in Charitable Funds.

The free reserves of the Charity at 31<sup>st</sup> December 2024 were £56,984 (2023: £53,433). These are the net cash assets of the Charity at the end of the financial year.

**b) Grant making policy**

The Charity invites applications in accordance with its objects by writing to the Secretaries. Grants of less than £600 may be agreed by the Chairman and grants over £600 are ratified by the Committee of Trustees. 103 minor grants were made in the year.

**Signed on behalf of the Trustees by**



Mrs E Kidson  
Chairman

Date.....

*28<sup>th</sup> April 2025*

**THOMPSON PRITCHARD TRUST**

**RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 DECEMBER 2024**

	<b>Unrestricted Funds</b>	
	<b>2024</b>	<b>2023</b>
<b>Receipts</b>		
Dividends	33,951	31,617
Interest	2,976	2,261
	<u>36,927</u>	<u>33,879</u>
<b>Other Receipts</b>		
Portfolio Movement	-	-
	<u>36,927</u>	<u>33,879</u>
<b>Payments</b>		
Grants	29,325	34,472
Governance	3,036	2,740
Portfolio Movement	1,015	456
	<u>33,376</u>	<u>37,609</u>
<b>Net Receipts/(Payments)</b>	3,551	(3,729)
Cash Funds last year end	<u>53,433</u>	<u>57,222</u>
<b>Cash Funds this year end</b>	<u>56,984</u>	<u>53,433</u>

THOMPSON PRITCHARD TRUST

RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 DECEMBER 2024

	2024	2023
<b>Cash Funds</b>		
Share of Cafcash Account	33,933	29,318
Harris Allday Earnings Account	8,422	8,769
Harris Allday Deposit Account	14,629	15,346
<b>Total Cash Funds</b>	<u>56,984</u>	<u>53,433</u>
<b>Investments</b>	<b>Cost</b>	<b>Market Value 2024</b>
		<b>Market Value 2023</b>
Portfolio with EFG Harris Allday	693,377	835,613
	<u>                    </u>	<u>819,424</u>

Signed on behalf of the Trustees by

*Emma Kidson*

Mrs E Kidson

Chairman

Date.....

*28<sup>th</sup> April 2025*

**THOMPSON PRITCHARD TRUST**

England & Wales - Charity number 234601

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# Accounts

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**THOMPSON PRITCHARD TRUST  
REGISTERED CHARITY NUMBER 234601**

**STATEMENT OF ACCOUNTS  
FOR THE YEAR ENDED 31 DECEMBER 2023**

**WR PARTNERS  
CHARTERED ACCOUNTANTS  
BELMONT HOUSE  
SHREWSBURY BUSINESS PARK  
SHREWSBURY  
SHROPSHIRE  
SY2 6LG**

**INDEPENDENT EXAMINER'S REPORT ON THE UNAUDITED ACCOUNTS OF**  
**THOMPSON PRITCHARD TRUST**  
**FOR THE YEAR ENDED 31 DECEMBER 2023**

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**Independent examiner's report to the Trustees of Thompson Pritchard Trust ('the Charity')**

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This report is made solely to the charity's Trustees, as a body, in accordance with section 145 of the Charities Act 2011 and regulations made under section 154 of that Act. My work has been undertaken so that I might state to the charity's Trustees those matters I am required to state to them in an independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the charity and the charity's trustees as a body for my work or for this report.

**Responsibility and basis of report**

As the Trustees of the Charity you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the 2011 Act').

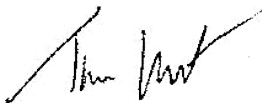
I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

**Independent examiner's statement**

I have completed my examination. I confirm that no 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 Charity as required by section 130 of the 2011 Act; or
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3. the accounts do 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



Tim Lunt  
**WR Partners**  
Chartered Accountants  
Belmont House  
Shrewsbury Business Park  
Shrewsbury  
SY2 6LG

BA FCCA MRPI

Dated 11/07/2024

**THOMPSON PRITCHARD TRUST**

**TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2023**

**CHARITY REGISTERED NUMBER 234601**

**TRUSTEES**

Mrs E Kidson (Chairman)  
Dr J Beach  
Mr I F Davies (Treasurer) (Resigned in Year)  
Dr L Hill (Resigned in Year)  
Mrs J Williams (Vice Chairman)  
Dr N O'Connor (Resigned in Year)  
Mrs L Gill  
Dr S Sutton  
Dr D Northern (Joint Secretary)  
Dr P Bottomley (Joint Secretary)  
Mr D Stacey  
Dr E Nolan (Appointed in Year)  
Mrs S Clesham (Appointed in Year)

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CAF Bank

**ADDRESS FOR  
CORRESPONDENCE**

Dr D Northern  
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Priorslee  
Telford  
TF2 9SX

## **THOMPSON PRITCHARD TRUST**

### **TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2023**

#### **STRUCTURE, GOVERNANCE & MANAGEMENT**

##### **a) Constitution**

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##### **b) Method of appointment of Trustees**

Trustees are appointed by the Committee at the Annual Meeting each year. Trustees can be co-opted at any time during the year.

##### **c) Risk management**

The Trustees have assessed the major risks to which the charity is exposed and are satisfied that systems are in place to mitigate the exposure to the major risks.

The Trustees consider the charity to be well positioned to manage the current situation and secure operations into the future.

## THOMPSON PRITCHARD TRUST

### TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2023

#### OBJECTIVES & ACTIVITIES

##### **a) Policies and objectives**

To apply the income thereof in or towards providing convalescent treatment for poor patients on their being discharged from the Royal Shrewsbury Infirmary or for other persons in any Convalescent Home for the time being provided by the Trustees or in any Institution which provides convalescent treatment for poor persons as the said Trustees shall in their discretion think fit.

In so far as the Trustees are unable to apply the clear income for this purpose they may apply the same as they think fit for the benefit of either the sick poor of Shropshire generally or of such sick poor persons resident therein as they select and in particular but without prejudice to the generality of the foregoing in one or more of the following ways:

- 1 The supply of bedding, comforts, food fuel and medical and other aids.
- 2 Grants for the benefits of persons who are sick, infirm, convalescent or in need of rest or change of air to defray the expenses of recuperative holidays or of obtaining domestic help.
- 3 The donation of money in aid of the funds of any convalescent home or other institution or organisation established or to be established for the care and relief of sick persons upon the terms which will ensure that the benefit of the institution or organisation are available for the sick poor of Shropshire.

##### **b) Activities for achieving objectives**

The Charity is listed in relevant charity directories and the information kept up to date. Many applications are made by way of information from the directories.

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Trustees bring to the Charity's notice cases from their own areas, both geographical and professional. All areas of the county are covered geographically. Professional expertise comes from the Church, the County Council, the medical profession as well as members of the general public.

When a significant donation is received or made press coverage is taken in the local papers.

In shaping the objectives and planning the activities for the year, the Trustees have considered the Charity Commission's Guidance on Public Benefit.

**THOMPSON PRITCHARD TRUST**

**TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2023**

**ACHIEVEMENTS & PERFORMANCE**

**a) Review of activities**

The Trust has continued to make its existence known by developing contacts with agencies and care services aware of people in need of help. Details of the charity are included in publications of charitable trusts. The Secretaries' links with the medical profession are invaluable and they are able to liaise closely with GPs and associations such as Nurses Leagues. All applications for help are carefully investigated and screened, Trustees making personal assessment visits and submitting confidential reports as the need arises. Those applications that do not fill the criteria are refused. Some are referred to other Charitable Trusts.

**FINANCIAL REVIEW**

**a) Reserves policy**

The Trustees invest reserves not required for short term purposes to produce further investment income. This is the charity's main source of income. Four Custodian Trustees are appointed to review the Charity's investments twice yearly and they report back to the Committee of Trustees. The investments are managed by stockbrokers and are held in Charitable Funds.

The free reserves of the charity at 31<sup>st</sup> December 2023 were £53,433 (2022: £57,222). These are the net cash assets of the charity at the end of the financial year.

**b) Grant making policy**

The Charity invites applications in accordance with its objects by writing to the Secretaries. Grants of less than £600 may be agreed by the Chairman and grants over £600 are ratified by the Committee of Trustees. 133 minor grants were made in the year.

**Signed on behalf of the Trustees by**



**Mrs E Kidson  
Chairman**

Date..... *28<sup>th</sup> May 2024* .....

THOMPSON PRITCHARD TRUST

RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 DECEMBER 2023

	Unrestricted Funds	
	2023	2022
<b>Receipts</b>		
Dividends	31,617	30,049
Interest	2,261	843
	<u>33,879</u>	<u>30,892</u>
<b>Other Receipts</b>		
Portfolio Movement	-	15,115
	<u>33,879</u>	<u>46,007</u>
<b>Payments</b>		
Grants	34,472	46,181
Governance	2,740	4,078
Portfolio Movement	456	-
	<u>37,609</u>	<u>50,259</u>
<b>Net Receipts/(Payments)</b>	(3,729)	(4,252)
Cash Funds last year end	<u>57,222</u>	<u>61,474</u>
<b>Cash Funds this year end</b>	<u>53,433</u>	<u>57,222</u>

THOMPSON PRITCHARD TRUST

RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 DECEMBER 2023

	2023	2022
<b>Cash Funds</b>		
Share of Cafcash Account	29,318	36,600
Harris Allday Earnings Account	8,769	5,133
Harris Allday Deposit Account	15,346	15,489
<b>Total Cash Funds</b>	<u>53,433</u>	<u>57,222</u>
<b>Investments</b>		
	<b>Cost</b>	<b>Market Value</b>
		<b>2023</b>
		<b>2022</b>
Portfolio with EFG Harris Allday	656,748	819,424
	<u>656,748</u>	<u>799,268</u>

Signed on behalf of the Trustees by

*Emma Kidson*  
Mrs E Kidson

Chairman

Date..... *28<sup>th</sup> May 2024*

**THOMPSON PRITCHARD TRUST**

England & Wales - Charity number 234601

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# Accounts

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**THOMPSON PRITCHARD TRUST  
REGISTERED CHARITY NUMBER 234601**

**STATEMENT OF ACCOUNTS  
FOR THE YEAR ENDED 31 DECEMBER 2022**

**WR PARTNERS  
CHARTERED ACCOUNTANTS  
BELMONT HOUSE  
SHREWSBURY BUSINESS PARK  
SHREWSBURY  
SHROPSHIRE  
SY2 6LG**

**INDEPENDENT EXAMINER'S REPORT ON THE UNAUDITED ACCOUNTS OF  
THOMPSON PRITCHARD TRUST  
FOR THE YEAR ENDED 31 DECEMBER 2022**

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**Responsibility and basis of report**

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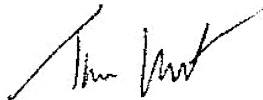
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Tim Lunt



BA FCCA MIRPM

**WR Partners**

Chartered Accountants

Belmont House

Shrewsbury Business Park

Shrewsbury

SY2 6LG

Dated 21/07/2023

**THOMPSON PRITCHARD TRUST**

**TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2022**

**CHARITY REGISTERED NUMBER 234601**

**TRUSTEES**

Mrs E Kidson (Chairman)  
Dr J Beach  
Miss S M Astbury MBE Resigned 28/04/2022  
Mr I F Davies (Treasurer)  
Dr L Hill  
Mrs J Williams (Vice Chairman)  
Dr N O'Connor  
Mrs L Gill  
Dr S Sutton  
Dr D Northern (Joint Secretary)  
Dr P Bottomley (Joint Secretary)  
Mr D Stacey  
The Mayor of Shrewsbury (Honorary Trustee) Resigned 28/04/2022

**ACCOUNTANTS**

WR Partners  
Belmont House  
Shrewsbury Business Park  
Shrewsbury  
Shropshire  
SY2 6LG

**SOLICITORS**

Wace Morgan  
21 St Mary's Street  
Shrewsbury  
Shropshire

**BANKERS**

CAF Bank

**ADDRESS FOR  
CORRESPONDENCE**

Dr D Northern  
8 Woodhouse Lane  
Priorslee  
Telford  
TF2 9SX

## **THOMPSON PRITCHARD TRUST**

### **TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2022**

#### **STRUCTURE, GOVERNANCE & MANAGEMENT**

##### **a) Constitution**

The Thompson Pritchard Trust was constituted by a Trust Deed dated 6 April 1939, founded by the Will of Annie Louise Pritchard and comprised in a scheme dated 12 October 1956. The Charity's registered number is 234601.

##### **b) Method of appointment of Trustees**

Trustees are appointed by the Committee at the Annual Meeting each year. Trustees can be co-opted at any time during the year.

##### **c) Risk management**

The Trustees have assessed the major risks to which the charity is exposed and are satisfied that systems are in place to mitigate the exposure to the major risks.

The Trustees consider the charity to be well positioned to manage the current situation and secure operations into the future.

## **THOMPSON PRITCHARD TRUST**

### **TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2022**

#### **OBJECTIVES & ACTIVITIES**

##### **a) Policies and objectives**

To apply the income thereof in or towards providing convalescent treatment for poor patients on their being discharged from the Royal Shrewsbury Infirmary or for other persons in any Convalescent Home for the time being provided by the Trustees or in any Institution which provides convalescent treatment for poor persons as the said Trustees shall in their discretion think fit.

In so far as the Trustees are unable to apply the clear income for this purpose they may apply the same as they think fit for the benefit of either the sick poor of Shropshire generally or of such sick poor persons resident therein as they select and in particular but without prejudice to the generality of the foregoing in one or more of the following ways:

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- 3 The donation of money in aid of the funds of any convalescent home or other institution or organisation established or to be established for the care and relief of sick persons upon the terms which will ensure that the benefit of the institution or organisation are available for the sick poor of Shropshire.

##### **b) Activities for achieving objectives**

The Charity is listed in relevant charity directories and the information kept up to date. Many applications are made by way of information from the directories.

The secretaries regularly inform and reminds relevant agencies (Citizens' Advice, Doctors' surgeries, local hospitals, hospices) in Shropshire and Telford and Wrekin of the Charity's existence and its objectives.

Trustees bring to the Charity's notice cases from their own areas, both geographical and professional. All areas of the county are covered geographically. Professional expertise comes from the Church, the County Council, the medical profession as well as members of the general public.

When a significant donation is received or made press coverage is taken in the local papers.

In shaping the objectives and planning the activities for the year, the Trustees have considered the Charity Commission's Guidance on Public Benefit.

**THOMPSON PRITCHARD TRUST**

**TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2022**

**ACHIEVEMENTS & PERFORMANCE**

**a) Review of activities**

The Trust has continued to make its existence known by developing contacts with agencies and care services aware of people in need of help. Details of the charity are included in publications of charitable trusts. The secretaries' links with the medical profession are invaluable and they are able to liaise closely with GPs and associations such as Nurses Leagues. All applications for help are carefully investigated and screened, Trustees making personal assessment visits and submitting confidential reports as the need arises. Those applications that do not fill the criteria are refused. Some are referred to other Charitable Trusts.

**FINANCIAL REVIEW**

**a) Reserves policy**

The Trustees invest reserves not required for short term purposes to produce further investment income. This is the charity's main source of income. Four Custodian Trustees are appointed to review the Charity's investments twice yearly and they report back to the Committee of Trustees. The investments are managed by stockbrokers and are held in Charitable Funds.

The free reserves of the charity at 31<sup>st</sup> December 2022 were £57,222 (2022: £61,474). These are the net cash assets of the charity at the end of the financial year.

**b) Grant making policy**

The Charity invites applications in accordance with its objects by writing to the Secretaries. Grants of less than £600 may be agreed by the Chairman and grants over £600 are ratified by the Committee of Trustees. 171 minor grants were made in the year.

**Signed on behalf of the Trustees by**



**Mrs E Kidson  
Chairman**

Date..... *30<sup>th</sup> June 2023* .....

**THOMPSON PRITCHARD TRUST**

**RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 DECEMBER 2022**

	<b>Unrestricted Funds</b>	
	<b>2022</b>	<b>2021</b>
<b>Receipts</b>		
Dividends	30,049	50,751
Interest	843	645
	<u>30,892</u>	<u>51,396</u>
<b>Other Receipts</b>		
Portfolio Movement	15,115	0
	<u>46,007</u>	<u>14,338</u>
<b>Payments</b>		
Grants	46,181	41,460
Governance	4,078	2,674
	<u>50,259</u>	<u>44,134</u>
<b>Net Receipts/(Payments)</b>	<b>(4,252)</b>	<b>7,262</b>
Cash Funds last year end	61,474	54,212
<b>Cash Funds this year end</b>	<b><u>57,222</u></b>	<b><u>61,474</u></b>

THOMPSON PRITCHARD TRUST

RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 DECEMBER 2022

	<b>2022</b>	<b>2021</b>
<b>Cash Funds</b>		
Share of Cafcash Account	36,600	57,870
Harris Allday Earnings Account	5,133	3,320
Harris Allday Deposit Account	15,489	284
<b>Total Cash Funds</b>	<u>57,222</u>	<u>61,474</u>
<b>Investments</b>		
	<b>Cost</b>	<b>Market Value 2021</b>
		<b>Market Value 2022</b>
Portfolio with EFG Harris Allday	666,439	799,268
	<u>666,439</u>	<u>878,188</u>

Signed on behalf of the Trustees by

*Emma Kidson*  
Mrs E Kidson

Chairman

Date..... *30<sup>th</sup> June 2023*

**THOMPSON PRITCHARD TRUST**

England & Wales - Charity number 234601

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# Accounts

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**THOMPSON PRITCHARD TRUST  
REGISTERED CHARITY NUMBER 234601**

**STATEMENT OF ACCOUNTS  
FOR THE YEAR ENDED 31 DECEMBER 2021**

**WR PARTNERS  
CHARTERED ACCOUNTANTS  
BELMONT HOUSE  
SHREWSBURY BUSINESS PARK  
SHREWSBURY  
SHROPSHIRE  
SY2 6LG**

**INDEPENDENT EXAMINER'S REPORT ON THE UNAUDITED ACCOUNTS OF**  
**THOMPSON PRITCHARD TRUST**  
**FOR THE YEAR ENDED 31 DECEMBER 2021**

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**Independent Examiner's Report to the Trustees of**

I report on the financial statements of the charity for the year ended 31 December 2021 which are set out on pages 1 to 6.

This report is made solely to the charity's Trustees, as a body, in accordance with section 145 of the Charities Act 2011 and regulations made under section 154 of that Act. My work has been undertaken so that I might state to the charity's Trustees those matters I am required to state to them in an Independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the charity and the charity's Trustees as a body, for my work or for this report.

**Responsibilities and basis of report**

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').

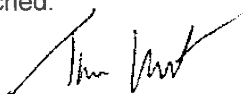
I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**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 charity 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.



Tim Lunt BA FCCA MIRPM

WR Partners  
Chartered Accountants  
Belmont House  
Shrewsbury Business Park  
Shrewsbury  
Shropshire  
SY2 6LG

Dated: 01/07/2022

**THOMPSON PRITCHARD TRUST**

**TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2021**

**CHARITY REGISTERED NUMBER 234601**

**TRUSTEES**

Mrs E Kidson (Chairman)  
Dr J Beach  
Miss S M Astbury MBE  
Mr I F Davies (Treasurer)  
Dr L Hill  
Mrs J Williams (Vice Chairman)  
Dr N O'Connor  
Mrs L Gill  
Dr S Sutton  
Dr D Northern (Joint Secretary)  
Dr P Bottomley (Joint Secretary)  
Mr D Stacey  
The Mayor of Shrewsbury (Honorary Trustee)

**ACCOUNTANTS**

WR Partners  
Belmont House  
Shrewsbury Business Park  
Shrewsbury  
Shropshire  
SY2 6LG

**SOLICITORS**

Wace Morgan  
21 St Mary's Street  
Shrewsbury  
Shropshire

**BANKERS**

CAF Bank

**ADDRESS FOR**

**CORRESPONDENCE**

Dr D Northern  
8 Woodhouse Lane  
Priorslee  
Telford  
TF2 9SX

## THOMPSON PRITCHARD TRUST

### TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2021

#### STRUCTURE, GOVERNANCE & MANAGEMENT

##### **a) Constitution**

The Thompson Pritchard Trust was constituted by a Trust Deed dated 6 April 1939, founded by the Will of Annie Louise Pritchard and comprised in a scheme dated 12 October 1956. The Charity's registered number is 234601.

##### **b) Method of appointment of Trustees**

Trustees are appointed by the Committee at the Annual Meeting each year. Trustees can be co-opted at any time during the year.

##### **c) Risk management**

The Trustees have assessed the major risks to which the charity is exposed and are satisfied that systems are in place to mitigate the exposure to the major risks.

The Charity like the country, has been impacted by the Covid-19 pandemic. The Trustees have assessed the potential impact on the future operations of the charity, taking into account its underlying financial resources and strength. They have taken proactive steps to manage the financial consequences to help ease the impact of the Coronavirus outbreak. The Trustees consider the charity to be well positioned to manage the current situation and secure operations into the future.

## THOMPSON PRITCHARD TRUST

### TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2021

#### OBJECTIVES & ACTIVITIES

##### **a) Policies and objectives**

To apply the income thereof in or towards providing convalescent treatment for poor patients on their being discharged from the Royal Shrewsbury Infirmary or for other persons in any Convalescent Home for the time being provided by the Trustees or in any Institution which provides convalescent treatment for poor persons as the said Trustees shall in their discretion think fit.

In so far as the Trustees are unable to apply the clear income for this purpose they may apply the same as they think fit for the benefit of either the sick poor of Shropshire generally or of such sick poor persons resident therein as they select and in particular but without prejudice to the generality of the foregoing in one or more of the following ways:

- 1 The supply of bedding, comforts, food fuel and medical and other aids.
- 2 Grants for the benefits of persons who are sick, infirm, convalescent or in need of rest or change of air to defray the expenses of recuperative holidays or of obtaining domestic help.
- 3 The donation of money in aid of the funds of any convalescent home or other institution or organisation established or to be established for the care and relief of sick persons upon the terms which will ensure that the benefit of the institution or organisation are available for the sick poor of Shropshire.

##### **b) Activities for achieving objectives**

The Charity is listed in relevant charity directories and the information kept up to date. Many applications are made by way of information from the directories.

The secretaries regularly inform and reminds relevant agencies (Citizens' Advice, Doctors' surgeries, local hospitals, hospices) in Shropshire and Telford and Wrekin of the Charity's existence and its objectives.

Trustees bring to the Charity's notice cases from their own areas, both geographical and professional. All areas of the county are covered geographically. Professional expertise comes from the Church, the County Council, the medical profession as well as members of the general public.

When a significant donation is received or made press coverage is taken in the local papers.

In shaping the objectives and planning the activities for the year, the Trustees have considered the Charity Commission's Guidance on Public Benefit.

**THOMPSON PRITCHARD TRUST**

**TRUSTEES' REPORT FOR THE YEAR ENDED 31 DECEMBER 2021**

**ACHIEVEMENTS & PERFORMANCE**

**a) Review of activities**

The Trust has continued to make its existence known by developing contacts with agencies and care services aware of people in need of help. Details of the charity are included in publications of charitable trusts. The secretaries' links with the medical profession are invaluable and they are able to liaise closely with GPs and associations such as Nurses Leagues. All applications for help are carefully investigated and screened, Trustees making personal assessment visits and submitting confidential reports as the need arises. Those applications that do not fill the criteria are refused. Some are referred to other Charitable Trusts.

**FINANCIAL REVIEW**

**a) Reserves policy**

The Trustees invest reserves not required for short term purposes to produce further investment income. This is the charity's main source of income. Four Custodian Trustees are appointed to review the Charity's investments twice yearly and they report back to the Committee of Trustees. The investments are managed by stockbrokers and are held in Charitable Funds.

The free reserves of the charity at 31<sup>st</sup> December 2021 were £61,474 (2020: £54,212). These are the net cash assets of the charity at the end of the financial year.

**b) Grant making policy**

The Charity invites applications in accordance with its objects by writing to the Secretaries. Grants of less than £500 may be agreed by the Chairman and grants over £500 are ratified by the Committee of Trustees. 146 minor grants were made in the year.

Signed on behalf of the Trustees by



Mrs E Kidson  
Chairman

Date.....*20<sup>th</sup> June 2022*

**THOMPSON PRITCHARD TRUST**

**RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 DECEMBER 2021**

	Unrestricted Funds	
	2021	2020
<b>Receipts</b>		
Dividends	50,751	13,712
Interest	645	626
	<u>51,396</u>	<u>14,338</u>
<b>Payments</b>		
Grants	41,460	27,471
Governance	2,674	1,082
	<u>44,134</u>	<u>28,553</u>
<b>Net Receipts/(Payments)</b>	7,262	(14,215)
Cash Funds last year end	54,212	68,427
Cash Funds this year end	<u>61,474</u>	<u>54,212</u>

THOMPSON PRITCHARD TRUST

RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 DECEMBER 2021

	2021	2020
<b>Cash Funds</b>		
Share of Cafcash Account	57,870	51,253
Harris Allday Earnings Account	3,320	2,675
Harris Allday Deposit Account	284	284
	<hr/>	<hr/>
<b>Total Cash Funds</b>	<b>61,474</b>	<b>54,212</b>
	<hr/>	<hr/>
<b>Investments</b>		
	<b>Cost</b>	<b>Market Value</b>
		<b>2021</b>
		<b>2020</b>
Charity Equity Fixed Income Fund	59,804	66,564
COIF Income Shares	4,349	22,751
Charishare Income Fund	203,060	371,839
Charity Equity Income Fund	203,060	379,201
UK Treasury 1.875%	33,992	37,833
	<hr/>	<hr/>
	504,265	878,188
	<hr/>	<hr/>

Signed on behalf of the Trustees by



Mrs E Kidson

Chairman

Date.....

