

FRED PENDLEBURY TRUST LEGACY

England & Wales · Charity number 242863

Details

Other names	THE PENDLEBURY TRUST
Status	Registered
Legal form	Other
Registered	1965-08-18
Register	View on the Charity Commission register

Contact

Address The Olive Tree Community Centre
Penketh Methodist Church
Chapel Road
Penketh
Warrington
WA5 2NB

Phone +447982452769

Email svmtrusts@outlook.com

Activities

Objects: TO RELIEVE EITHER GENERALLY OR INDIVIDUALLY PERSONS OF 50 YEARS OF AGE OR OVER WHO WERE BORN OR ARE RESIDENT IN THE AREA OF BENEFIT AND WHO ARE IN CONDITIONS OF NEED, HARDSHIP OR DISTRESS. (FOR FURTHER DETAILS SEE CLAUSE 19 OF THE SCHEME).

Activities: Providing financial assistance for individuals, aged 50 and over, born or living in Warrington. Funding of some Warrington Community Groups who cater for people aged 50 and over.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations
- **What:** General Charitable Purposes
- **Who:** Elderly/old People, People With Disabilities, Other Defined Groups

Geography

- **Area of benefit:** STOCKTON HEATH AND FORMER WARRINGTON COUNTY BOROUGH
- Warrington

Finances

Period end	Income	Expenditure	Assets	Employees
2025-10-31	£35,753	£35,004	-	-
2024-10-31	£35,587	£32,432	-	-
2023-10-31	£36,440	£29,825	-	-
2022-10-31	£34,698	£31,992	-	-
2021-10-31	£34,610	£31,021	-	-

Trustees

Name	Role	Appointed
Sue Rigby	Chair	2016-01-19
ALAN JAMES ROGERS		2023-03-21
Judith Carol Wheeler		2025-05-13
Kenneth Long		2020-07-29
Rev Linda Ruth Bishop		2025-09-01
Richard Verrill		2016-01-19

FRED PENDLEBURY TRUST LEGACY

England & Wales - Charity number 242863

Accounts

Fred Pendlebury Trust

Charity No: 242863

FRED PENDLEBURY TRUST LEGACY

Accounts, Trustees Annual Report & Independent Examiners Report

For Financial Year Ending
31st October 2025

Page 1	Trustees Annual Report
Page 9	Receipts and Payments Accounts
Page 10	Statement of Assets and Liabilities
Page 11	Independent Examiners Report



Trustees' Annual Report for the period

Period start date			Period end date				
From	Day	Month	Year	To	Day	Month	Year
	1 st	November	2024		31 st	October	2025

Section A Reference and administration details

Charity name

Other names charity is known by

Registered charity number (if any)

Charity's principal address

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	Mrs Sue Rigby	Chair		Appointed as a Circuit Steward of the Sankey Valley Methodist Circuit
2	Revd Mark Coles	Trustee	To 31/08/2025	Appointed by the Sankey Valley Methodist Circuit as a presbyter engaged in ministry in the Warrington Unitary Authority
	Revd Linda Bishop	Trustee	From 01/09/2025	Appointed by the Sankey Valley Methodist Circuit as a presbyter engaged in ministry in the Warrington Unitary Authority
3	Cllr Wendy Johnson	Mayor of Warrington	To 19/05/2025	Governing document designates the incumbent Mayor as Trustee
4	Cllr Mo Hussain	Mayor of Warrington	From 19/05/2025	Governing document designates the incumbent Mayor as Trustee
5	Cllr Laurence Murphy	Chair of Stockton Heath Parish Council	To 13/05/2025	Governing document designates the incumbent Chair of Stockton Heath Parish Council as Trustee

	Cllr Judith Wheeler	Chair of Stockton Heath Parish Council	From 13/05/2025	Governing document designates the incumbent Chair of Stockton Heath Parish Council as Trustee
6	Mr Richard Verrill	Trustee		Appointed as a Circuit Steward of the Sankey Valley Methodist Circuit
7	Mr Kenneth Long	Trustee		
8	Mr Alan Rogers	Trustee		

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

Name	Dates acted if not for whole year
N/A	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Investment Managers	COIF	CCLA, Investment Management Limited One Angel Lane London EC4R 3AB
Bankers	The Cooperative Bank	PO Box 250, Skelmersdale, WN8 6WT

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

Grant administration and accounts – Mrs Chris Ralston

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document
(eg. trust deed, constitution)

The Trust was formed, and the constitution was adopted on 18th August 1965 and subsequently amended on 20th July 1977. A new scheme was sealed on 23 September 2004, which altered the governing document of the charity. The scheme was further amended in June 2007, January 2010 and July 2015.

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

The Charity is constituted as a Trust.

Trustee selection methods
(eg. appointed by, elected by)

In accordance with the governing document five of the Trustees are appointed by virtue of the office they hold. These are:

- Two Circuit Stewards from the Sankey Valley Methodist Circuit
- A presbyter from the Sankey Valley Methodist Circuit engaged in ministry within the Warrington Unitary Authority
- The Mayor of Warrington
- The Chair of Stockton Heath Parish Council

Two further trustees are appointed by the Trustees. Those trustees must be members of a Methodist Church within the Warrington Unitary Authority which forms part of the area encompassed by the Sankey Valley Methodist Circuit.

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.

The Trust has strong links with the Methodist Church in the local area.

The Trust Administrator completes the day-to-day grant administration and accounting for the Trust. A contribution is made to the Circuit for office space, stationery etc.

RISKS: Trust's main risk arises from misuse of awards (e.g. applicants benefitting financially from awards made). This is mitigated by a policy that the Trust purchases the goods and services requested and, only under exceptional circumstances, makes direct payment to individual applicants. Bank Transfers are the preferred method of payment which require dual authorisation. Four Trustees have access to the bank account so transactions can be monitored. Applications are not generally accepted from individual self-referrers and must be made by local referring agencies working with vulnerable individuals.

DATA PROTECTION: The Fred Pendlebury Trust is registered with the Information Commissioners Office under the Data Protection Act 2018. Registration Number: Z104374. The handling of Data is in accordance with the requirements of the said Act.

TRUSTEES INDUCTION: Potential Trustees are briefed by the Chair prior to their appointment. A Trustee handbook is available for all Trustees.

FIT AND PROPER PERSONS: For the purposes of the Finance Act 2010 it is considered that all Trustees are believed to be fit and proper persons to hold the office of Trustee.

Section C

Objectives and activities

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

CHARITABLE OBJECTS: To relieve either generally or individually persons of 50 years of age or over who were born or are resident in the area of benefit and who are in conditions of need, hardship or distress (for further details see clause 19 of the scheme). The area of benefit is defined as the Warrington Unitary Authority.

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)

The object of the Trust is for the benefit of those who are over 50 years of age and are resident in the Warrington area, in particular but not exclusively by offering grants to cover the financial costs of items such as kitchen appliances, domestic furnishings, essential repairs or decoration, access equipment, medical appliances, clothing or in some cases emergency food. The Trust also offers modest financial assistance to applicants who are in arrears.

Individual applicants to the Trust do not have to be pensioners or be in receipt of any kind of benefit but must be able to show some evidence of genuine need or financial hardship or distress. The Trust takes referrals from organisations working with the vulnerable within the area of benefit,

There are seven Trustees who meet 8 to 10 times per year to discuss applications. Between meetings emergency grants of up to £600 per applicant can be approved by the Chair and the Deputy Chair, at their discretion. Applications above this amount need to be circulated to all the Trustees with approval required from a quorum of Trustees 1(at the moment this is four).

During this financial year the Trustees have considered 81 applications.

We have received significant feedback from referral organisations and the applicants themselves advising that the items purchased with grant assistance make a huge difference to the lives of the individuals concerned.

Over the financial year the Trust has received thank you letters and emails from successful grant applicants.

With its strong Methodist connection, the Trust undertakes to bring a Christian ethos to all its work by offering a compassionate and understanding service.

The Trustees future strategy will be to consider how we meet an ever growing demand on our services and how we best equip ourselves to be able to respond to the needs generated by welfare/benefit changes.

Additional details of objectives and activities (Optional information)

CONTROL OF GRANT MAKING: The trustees confirm that they have referred to the guidance in the Charity Commission's general guidance on public benefit when reviewing the Trust's aims and objectives and in setting the grant making policy for the year.

CONTROL OF FINANCE AND INVESTMENT ASSETS: Note: The Trust employs an administrator to manage the grant making administration and financial book-keeping and office space is provided by the Sankey Valley Methodist Circuit, for which a small charge is made.

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

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

i) A full financial report is presented to the Trustees at their bi-annual meetings, at intervening times the financial position of the Trust is monitored by the Administrator. In the event of unforeseen expenditure, the trustees have sufficient reserves and financial control to minimise any financial risk.

ii) Assets: The Trust generates income for its charitable work from investment funds operated by CCLA, specialist investment management for charities and faith organisations. They are authorised to make investment decisions based on security rather than profit. The monies not invested in this way are temporarily held on deposit with established banks and financial institutions. The investment management team has authority to manage the investments in accordance with the Trust's ethical policy and attitude to risk.

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

During this financial year the Trustees have approved grants totalling £28,859.08, of which applications totalling £4,222 were later withdrawn, as were two applications from the previous financial year totalling £1,050.

The total sum paid out was £27,242.94 (including gifts for vacuum cleaners and mattress protectors), of which £3,452.01 related to grants outstanding from previous financial years. The amount for gifts was £213.89.

	£
Cleaning	426
Decorating	895
Domestic Equipment	1,325
Financial Assistance	269
Fitting	180
Floor Coverings	12,167
Furnishings	2,431
Furniture	355
Garden Work (inc furniture)	2,275
Mattress Cover Gift	108
Mortgage Arrears	331
Personal Computing	109
Personal Transport inc mobility aids	1,259
Property Service Charge	124
Respite Care	752
Special Equipment	70
Vacuum Cleaner Gift	206
White Goods	4,441

During the year, the Trust received no refunds for goods and services returned/not required.

Income generated from investments was £35,753.23

The total investment portfolio amounted to £1,134,057.36 at 31st Oct 2025 (value in 2024 £1,142,738.92)

Brief statement of the charity's policy on reserves

The Trust currently meets its running costs and grant awards from the interest received on its investments. The Trust keeps between 3 and 6 months cash reserves available for use for these purposes. In order to maintain these levels of cash reserves the Trustees review the grant award criteria (maximum grant and period between repeat applications) twice a year and, if necessary, adjust the grant award criteria to maintain the stated levels of cash reserves.

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.

INVESTMENT POLICY: The Charity's only source of funds is from the investment portfolio with income and interest being available for grants.

The investments of the Trust are made in accordance with Charity Commission guidelines. These include regard for UK and overseas investment and a proportion of medium risk/balanced investments and gilts.

The Trustees have adopted an ethical investment policy. This commits the Pendlebury Trust to adopting an ethical policy that prevents it from directly trading in companies that make a profit from gambling, pornography and arms manufacture and dealings. The investments are handled by CCLA on behalf of the Trust.

The Trust undertakes no fund raising activities.

Other optional information

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Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s)	<i>SP Rigby</i>	<i>R Verrill</i>
Full name(s)	SUSAN PATRICIA RIGBY	RICHARD VERRILL
Position (eg Secretary, Chair, etc)	CHAIR	DEPUTY CHAIR
Date	18-2-26 20/2/26	

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 Current Account	36,321	-	-
	Total cash funds	36,321	-	-

(agree balances with receipts and payments account(s))*uncleared cheques noted below

OK	OK	OK
Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £

B2 Other monetary assets

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

B3 Investment assets

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	COIF Ethical Fund A	Endowment	561,884	929,185
	COIF Property Fund	Endowment	100,000	106,372
	COIF Ethical Fund B	Endowment	60,000	98,500
			-	-

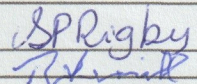
B4 Assets retained for the charity's own use

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

B5 Liabilities

Categories	Details	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
	Sue Rigby - Chair	18/2/26
	Richard Verrill - Deputy Chair	20/2/26



Charity Name
Fred Pendlebury Trust

No (if any)
242863

Receipts and payments accounts

CC16a

For the period from 01/11/2024 To 31/10/2025

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 £
A1 Receipts					
Bank Interest	-	-	-	-	-
Investment Income (after tax)	35,753	-	-	35,753	35,513
Grants Returned	-	-	-	-	74
Sub total (Gross income for AR)	35,753	-	-	35,753	35,587
A2 Asset and investment sales, (see table).					
Total share sales	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	35,753	-	-	35,753	35,587
A3 Payments					
Charitable Grants	27,243	-	-	27,243	25,179
Office expenses and administrator salary	7,611	-	-	7,611	6,803
Grave maintenance	-	-	-	-	300
Independent Examiner's fee	150	-	-	150	150
Miscellaneous	-	-	-	-	-
Sub total	35,004	-	-	35,004	32,432
A4 Asset and investment purchases. (see table)					
Purchase of CCLA Income Units	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	35,004	-	-	35,004	32,432
Net of receipts/(payments)	749	-	-	749	3,155
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	35,572	-	-	35,572	35,572
Cash funds this year end	36,321	-	-	36,321	38,727

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 Current Account	36,321	-	-
	Total cash funds	36,321	-	-

(agree balances with receipts and payments account(s))*uncleared cheques noted below

OK OK OK

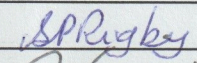
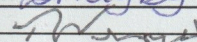
	Details	Unrestricted to nearest £	Restricted to nearest £	Endowment to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
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	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	Print Name	Date of approval
	Sue Rigby - Chair	18/2/26
	Richard Verrill - Deputy Chair	25/2/26



Charity Name
Fred Pendlebury Trust

No (if any)
242863

Receipts and payments accounts

CC16a

For the period from 01/11/2024 To 31/10/2025

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	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
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A6 Cash funds last year end	35,572	-	-	35,572	32,416
Cash funds this year end	36,321	-	-	36,321	35,572



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
Fred Pendlebury Trust Legacy

**On accounts for the year
ended**

31ST October 2025

Charity no

242863

Set out on pages

Eight and nine

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31st. October 2023.

**Responsibilities and
basis of report**

As the charity trustees of the Trust, 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 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 which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed:

Alan A Clements

Date:

12th. March
2026

Name:

Rev'd. Alan A. Clements.

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

Fellow Association of Charity Independent Examiners

Address:

15 Carleton Road, Great Knowley, Chorley PR6 8TQ.

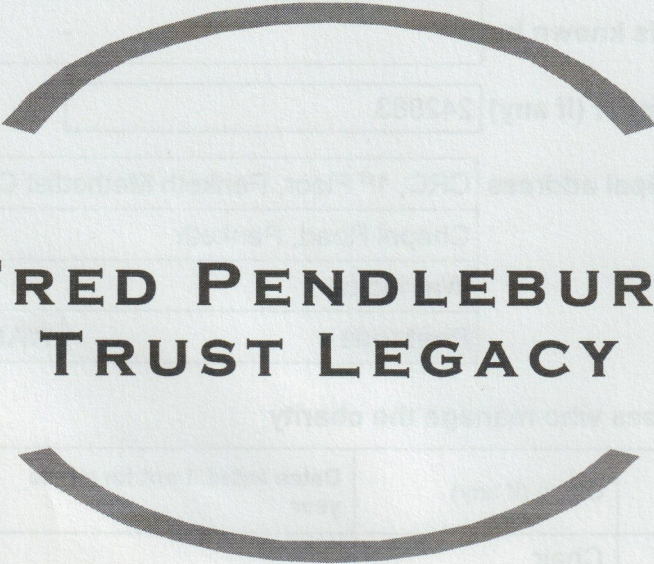
FRED PENDLEBURY TRUST LEGACY

England & Wales - Charity number 242863

Accounts

Fred Pendlebury Trust

Charity No: 242863



FRED PENDLEBURY TRUST LEGACY

Accounts, Trustees Annual Report & Independent Examiners Report

**For Financial Year Ending
31st October 2024**

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Trustees' Annual Report for the period

Period start date			Period end date				
From	Day 1 st	Month November	Year 2023	To	Day 31 st	Month October	Year 2024

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4	Cllr Steve Wright	Mayor of Warrington	Until 30/06/2024	Governing document designates the incumbent Mayor as Trustee
5	Cllr Laurence Murphy	Chair of Stockton Heath Parish Council	From 14/05/2024	Governing document designates the incumbent Chair of Stockton Heath Parish Council as Trustee
	Cllr Helen Dutton	Chair of Stockton Heath Parish Council	Until 14/05/2024	Governing document designates the incumbent Chair of Stockton Heath Parish Council as Trustee

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

Name	Dates acted if not for whole year
N/A	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Investment Managers	COIF	CCLA, Investment Management Limited Senator House, 85 Queen Victoria Street, London, EC4V 4ET
Bankers	The Cooperative Bank	PO Box 250, Skelmersdale, WN8 6WT

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

Grant administration and accounts – Mrs Chris Ralston

Section B Structure, governance and management

Description of the charity's trusts

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<p>How the charity is constituted (eg. trust, association, company)</p>	<p>The Charity is constituted as a Trust.</p>
<p>Trustee selection methods (eg. appointed by, elected by)</p>	<p>In accordance with the governing document five of the Trustees are appointed by virtue of the office they hold. These are:</p> <ul style="list-style-type: none"> • Two Circuit Stewards from the Sankey Valley Methodist Circuit • A presbyter from the Sankey Valley Methodist Circuit engaged in ministry within the Warrington Unitary Authority • The Mayor of Warrington • The Chair of Stockton Heath Parish Council <p>Two further trustees are appointed by the Trustees. Those trustees must be members of a Methodist Church within the Warrington Unitary Authority which forms part of the area encompassed by the Sankey Valley Methodist Circuit.</p>

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During this financial year the Trustees have considered 54 applications. We have received significant feedback from referral organisations and the applicants themselves advising that the items purchased with grant assistance make a huge difference to the lives of the individuals concerned.

Over the financial year the Trust has received thank you letters and emails from successful grant applicants.

With its strong Methodist connection, the Trust undertakes to bring a Christian ethos to all its work by offering a compassionate and understanding service.

The trustees confirm that they have referred to the guidance in the Charity Commission's general guidance on public benefit when reviewing the Trust's aims and objectives and in setting the grant making policy for the year.

Additional details of objectives and activities (Optional information)

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

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

CONTROL OF GRANT MAKING: Before a grant is awarded, the Administrator presents a report with all relevant details to the trustees. Subject to the agreed cash limits, the decision to award a grant is made by the trustee panel meeting to discuss the applications which meets 8 to 0 times a year. Payments are made to suppliers and contractors and only in exceptional circumstances direct to a beneficiary so seeking to ensure that grants made are genuinely used according to the purpose stated on the application form.

CONTROL OF FINANCE AND INVESTMENT ASSETS: Note: The Trust employs an administrator to manage the grant making administration and financial book-keeping and office space is provided by the Sankey Valley Methodist Circuit for which a small charge is made.

i) A full financial report is presented to the Trustees at bi-annual general meetings, at intervening times the financial position of the Trust is monitored by the Administrator. In the event of unforeseen expenditure, the trustees have sufficient reserves and financial control to minimise any financial risk.

ii) Assets: The Trust generates income for its charitable work from investment funds operated by CCLA, specialist investment management for charities and faith organisations. They are authorised to make investment decisions based on security rather than profit. The monies not invested in this way are temporarily held on deposit with established banks and financial institutions. The investment management team has authority to manage the investments in accordance with the Trust's ethical policy and attitude to risk.

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

During this financial year the Trustees have approved grants totalling £20,927.30, of which applications totalling £925 were later withdrawn, as were three applications from the previous financial year totalling £680.

The total sum paid out was £24,397.60 (including gifts for vacuum cleaners and mattress protectors), of which £5,353.99 related to grants outstanding from previous financial years. The amount for gifts was £466.31.

	£
Decorating	1,160
Domestic Equipment	200
Financial Assistance	90
Fitting	220
Floor Coverings	10,310
Furnishings	711
Furniture	2,701
Garden Work (inc furniture)	1,066
Heating and Lighting	887
Mattress Cover Gift	55
Medical	319
Personal Transport inc mobility aids	1,620
Removal and Storage	750
Respite Care	798
Vacuum Cleaner Gift	531
White Goods	3,761

During the year, the Trust received refunds of £74 for goods and services returned/not required.

Income generated from investments was £35,512.72

The total investment portfolio amounted to £1,142,738.92 at 31st Oct 2024 (value in 2023 £1,038,943.85)

Section E

Financial review

Brief statement of the charity's policy on reserves

The Trust currently meets its running costs and grant awards from the interest received on its investments. The Trust keeps between 3 and 6 months cash reserves available for use for these purposes. In order to maintain these levels of cash reserves the Trustees review the grant award criteria (maximum grant and period between repeat applications) twice a year and, if necessary, adjust the grant award criteria to maintain the stated levels of cash reserves.

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.

INVESTMENT POLICY:

The Charity's only source of funds is from the investment portfolio with income and interest being available for grants.

The investments of the Trust are made in accordance with Charity Commission guidelines and are managed by CCLA Investment Management.

The Trustees have adopted an ethical investment policy. This commits the Pendlebury Trust to adopting an ethical policy that prevents it from directly trading in companies that make a profit from gambling, pornography and arms manufacture and dealings. This is why the Trust has chosen to invest via CCLA.

The Trust undertakes no fund raising activities.

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)	<i>SP Rigby</i>	<i>Richard</i>
Full name(s)	SUSAN PATRICIA RIGBY	RICHARD VERRILL
Position (eg Secretary, Chair, etc)	CHAIR	DEPUTY CHAIR

Date 16.1.2025



Charity Name
Fred Pendlebury Trust

No (if any)
242863

CC16a

Receipts and payments accounts

For the period from 01/11/2023 To 31/10/2024

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 £
A1 Receipts					
Bank Interest	-	-	-	-	-
Investment Income (after tax)	35,513	-	-	35,513	34,995
Grants Returned	74	-	-	74	1,446
Sub total (Gross income for AR)	35,587	-	-	35,587	36,440
A2 Asset and investment sales, (see table).					
Total share sales	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	35,587	-	-	35,587	36,440
A3 Payments					
Charitable Grants	25,179	-	-	25,179	22,762
Office expenses and administrator salary	6,803	-	-	6,803	6,669
Grave maintenance	300	-	-	300	200
Independent Examiner's fee	150	-	-	150	150
Miscellaneous	-	-	-	-	44
Sub total	32,432	-	-	32,432	29,825
A4 Asset and investment purchases, (see table)					
Purchase of CCLA Income Units	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	32,432	-	-	32,432	29,825
Net of receipts/(payments)	3,155	-	-	3,155	6,616
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	32,416	-	-	32,416	25,801
Cash funds this year end	35,572	-	-	35,572	32,416

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 Current Account	35,572	-	-
	Total cash funds	35,572	-	-

(agree balances with receipts and payments account(s))*uncleared cheques noted below

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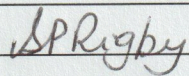
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	COIF Ethical Fund A	Endowment	561,884	939,627
	COIF Property Fund	Endowment	100,000	103,505
	COIF Ethical Fund B	Endowment	60,000	99,607
			-	-

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

B5 Liabilities	Details	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
	Sue Rigby - Chair Richard Verrill - Deputy Chair	16.1.25



Section A Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
Fred Pendlebury Trust Legacy

**On accounts for the year
ended**

31ST October 2024
Charity no 242863

Set out on pages

Nine and ten

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31st. October 2023.

**Responsibilities and
basis of report**

As the charity trustees of the Trust, 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 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 which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed: *Alan A. Clements*

Date: 31st. January 2025.

Name: Rev'd. Alan A. Clements.

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

Fellow Association of Charity Independent Examiners

Address: 15 Carleton Road, Great Knowley, Chorley PR6 8TQ.

[Empty address lines]

FRED PENDLEBURY TRUST LEGACY

England & Wales - Charity number 242863

Accounts



Trustees' Annual Report for the period

		Period start date			Period end date		
From	Day	Month	Year	To	Day	Month	Year
	1 st	November	2022		31 st	October	2023

Section A Reference and administration details

Charity name	Fred Pendlebury Trust Legacy		
Other names charity is known by	-		
Registered charity number (if any)	242863		
Charity's principal address	CRC, 1 st Floor, Penketh Methodist Church,		
	Chapel Road, Penketh		
	Warrington		
	Postcode	WA5 2NB	

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	Mrs Sue Rigby	Chair		Appointed as a Circuit Steward of the Sankey Valley Methodist Circuit
2	Revd Mark Coles	Trustee		Appointed by the Sankey Valley Methodist Circuit as a presbyter engaged in ministry in the Warrington Unitary Authority
3	Cllr Jean Flaherty	Mayor of Warrington	Until 01/07/2023	Governing document designates the incumbent Mayor as Trustee
4	Cllr Steve Wright	Mayor of Warrington	From 01/07/2023	Governing document designates the incumbent Mayor as Trustee
5	Cllr Pamela Todd	Chair of Stockton Heath Parish Council	Until 09/05/2023	Governing document designates the incumbent Chair of Stockton Heath Parish Council as Trustee
	Cllr Helen Dutton	Chair of Stockton Heath Parish Council	From 09/05/2023	Governing document designates the incumbent Chair of Stockton Heath Parish Council as Trustee
6	Mr Richard Verrill	Trustee		Appointed as a Circuit Steward of the Sankey Valley Methodist Circuit

7	Mr Kenneth Long	Trustee		
8	Mr Alan Rogers	Trustee	From 21/02/2023	

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

Name	Dates acted if not for whole year
N/A	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Investment Managers	COIF	CCLA, Investment Management Limited Senator House, 85 Queen Victoria Street, London, EC4V 4ET
Bankers	The Cooperative Bank	PO Box 250, Skelmersdale, WN8 6WT

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

Grant administration and accounts – Mrs Chris Ralston

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document
(eg. trust deed, constitution)

The Trust was formed, and the constitution was adopted on 18th August 1965 and subsequently amended on 20th July 1977. A new scheme was sealed on 23 September 2004, which altered the governing document of the charity. The scheme was further amended in June 2007, January 2010 and July 2015.

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

The Charity is constituted as a Trust.

Trustee selection methods
(eg. appointed by, elected by)

In accordance with the governing document five of the Trustees are appointed by virtue of the office they hold. These are:

- Two Circuit Stewards from the Sankey Valley Methodist Circuit
- A presbyter from the Sankey Valley Methodist Circuit engaged in ministry within the Warrington Unitary Authority
- The Mayor of Warrington
- The Chair of Stockton Heath Parish Council

Two further trustees are appointed by the Trustees. Those trustees must be members of a Methodist Church within the Warrington Unitary Authority which forms part of the area encompassed by the Sankey Valley Methodist Circuit.

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.

The Trust has strong links with the Methodist Church in the local area.

The Trust Administrator completes the day-to-day grant administration and accounting for the Trust. A contribution is made to the Circuit for office space, stationery etc.

RISKS: Trust's main risk arises from misuse of awards (e.g. applicants benefitting financially from awards made). This is mitigated by a policy that the Trust purchases the goods and services requested and, only under exceptional circumstances, makes direct payment to individual applicants. Bank Transfers are the preferred method of payment which require dual authorisation. Four Trustees have access to the bank account so transactions can be monitored. Applications are not accepted from individual self-referrers and must be made by local referring agencies working with vulnerable individuals.

DATA PROTECTION: The Fred Pendlebury Trust is registered with the Information Commissioners Office under the Data Protection Act 2018. Registration Number: Z104374. The handling of Data is in accordance with the requirements of the said Act.

TRUSTEES INDUCTION: Potential Trustees are briefed by the Chair prior to their appointment. A Trustee handbook is available for all Trustees.

FIT AND PROPER PERSONS: For the purposes of the Finance Act 2010 it is considered that all Trustees are believed to be fit and proper persons to hold the office of Trustee.

Section C

Objectives and activities

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

CHARITABLE OBJECTS: The Fred Pendlebury Trust exists primarily to grant financial help to those aged 50 and over who live within the area of the Warrington Unitary Authority. The original area of benefit being amended 23rd September 2004.

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)

The object of the Trust is for the benefit of those who are over 50 years of age and are resident in the Warrington area, in particular but not exclusively by offering grants to cover the financial costs of items such as kitchen appliances, domestic furnishings, essential repairs or decoration, access equipment, medical appliances, clothing or in some cases emergency food. The Trust also offers modest financial assistance to applicants who are in arrears or have been advised to seek a Debt Recovery Order.

Individual applicants to the Trust do not have to be pensioners or be in receipt of any kind of benefit but must be able to show some evidence of genuine need or financial hardship or distress. The Trust primarily takes referrals from organisations working with the vulnerable within the area of benefit,

There are seven Trustees who meet approximately once per month to discuss applications. Between meetings emergency grants of up to £400

per applicant can be approved by the Chair and the Deputy Chair, at their discretion. Applications above this amount need to be circulated to all the Trustees with approval required from each one.

The Trust receives all its income for its charitable work from investment funds and from interest on reserves. It does not engage in fundraising activities.

During this financial year the Trustees have considered 74 grants.

We have received significant feedback from referral organisations and the applicants themselves advising that the items purchased with grant assistance make a huge difference to the lives of the individuals concerned.

Over the financial year the Trust has received thank you letters and emails from successful grant applicants.

With its strong Methodist connection, the Trust undertakes to bring a Christian ethos to all its work by offering a compassionate and understanding service.

The Trustees future strategy will be to consider how we meet an ever growing demand on our services and how we best equip ourselves to be able to respond to the needs generated by welfare/benefit changes.

Additional details of objectives and activities (Optional information)

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

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

CONTROL OF GRANT MAKING: Before a grant is awarded, the Administrator presents a report with all relevant details to the trustees. Subject to the agreed cash limits, the decision to award a grant is made by the trustee panel meeting to discuss the applications which meets approximately 10 times a year. Payments are made to suppliers and contractors and only in exceptional circumstances direct to a beneficiary so seeking to ensure that grants made are genuinely used according to the purpose stated on the application form.

CONTROL OF FINANCE AND INVESTMENT ASSETS: Note: The Trust employs an administrator to manage the grant making administration and financial book-keeping and office space is provided by the Sankey Valley Methodist Circuit. A charge for services rendered by the church to the trust is made. Details of such charges are shown in the financial statements of the trust.

i) A full financial report is presented to the Trustees at their bi-annual meetings, at intervening times the financial position of the Trust is monitored by the Administrator. In the event of unforeseen expenditure, the trustees have sufficient reserves and financial control to minimise any financial risk.

ii) Assets: The Trust generates income for its charitable work from investment funds operated by CCLA, specialist investment management for charities and faith organisations. They are authorised to make investment decisions based on security rather than profit. The monies not invested in this way are temporarily held on deposit with established banks and financial institutions. The investment management team has authority to manage the investments in accordance with the Trust's ethical policy and attitude to risk.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

During this financial year the Trustees have approved grants totalling £21,876.02, of which applications totalling £1,400 were later withdrawn, as were three applications from the previous financial year totalling £430.

The total sum paid out was £22,387.22 (including gifts for vacuum cleaners and mattress protectors), of which £3,352 related to grants outstanding from previous financial years. The amount for gifts was £367.91.

	£
Decorating	400
Domestic Equipment	441
Financial Assistance	555
Fitting	105
Floor Coverings	7,903
Furnishings	1,003
Furniture	1,467
Heating and Lighting	1,451
Mattress Cover Gift	25
Medical	319
Personal Transport inc mobility aids	1,250
Removal and Storage	1,150
Rent	475
Vacuum Cleaner Gift	321
White Goods	5,167

During the year, the Trust received refunds of £1,445.73 for goods and services returned/not required.

Income generated from investments was £34,994.54.

The total investment portfolio amounted to £1,038,943.85 at 31st Oct 2023 (value in 2022 £1,075,035)

Section E

Financial review

Brief statement of the charity's policy on reserves

The Trust currently meets its running costs and grant awards from the interest received on its investments. The Trust keeps between 3 and 6 months cash reserves available for use for these purposes. In order to maintain these levels of cash reserves the Trustees review the grant award criteria (maximum grant and period between repeat applications) twice a year and, if necessary, adjust the grant award criteria to maintain the stated levels of cash reserves.

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.

INVESTMENT POLICY: The Charity's only source of funds is from the investment portfolio with income and interest being available for grants.

The investments of the Trust are made in accordance with Charity Commission guidelines. These include regard for UK and overseas investment and a proportion of medium risk/balanced investments and gilts.

The Trustees have adopted an ethical investment policy. This commits the Pendlebury Trust to adopting an ethical policy that prevents it from directly trading in companies that make a profit from gambling, pornography and arms manufacture and dealings.

The Trust undertakes no fund raising activities.

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)	<i>S Prigby</i>	<i>R Verrill</i>
Full name(s)	SUSAN PATRICIA RIGBY	RICHARD VERRILL
Position (eg Secretary, Chair, etc)	CHAIR	DEPUTY CHAIR
Date	7.3.24 10/3/24	



Section A Independent Examiner's Report

Report to the trustees/ members of

Charity Name Fred Pendlebury Trust IEGACY

On accounts for the year ended

31ST October 2023 Charity no 242863

Set out on pages

Eight and nine

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31st. October 2023.

Responsibilities and basis of report

As the charity trustees of the Trust, 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 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 which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
• the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed: Alan A Clements

Date: 28th.February 2024

Name: Rev'd. Alan A. Clements.

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

Fellow Association of Charity Independent Examiners

Address: 15 Carleton Road, Great Knowley, Chorley PR6 8TQ.



Charity Name Fred Pendlebury Trust		No (if any) 242863	CC16a
Receipts and payments accounts			
For the period from	Period start date 01/11/2022	To 31/10/2023	

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 £
A1 Receipts					
Bank Interest	-	-	-	-	-
Investment Income (after tax)	34,995	-	-	34,995	34,550
Grants Returned	1,446	-	-	1,446	148
Miscellaneous	-	-	-	-	-
Sub total (Gross income for AR)	36,440	-	-	36,440	34,698
A2 Asset and investment sales, (see table).					
Total share sales	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	36,440	-	-	36,440	34,698
A3 Payments					
Charitable Grants	22,762	-	-	22,762	24,495
Volunteer expenses/honoraria	-	-	-	-	-
Office expenses and administrator salary	6,669	-	-	6,669	7,112
Grave maintenance	200	-	-	200	200
Independent Examiner's fee	150	-	-	150	150
Miscellaneous	44	-	-	44	35
Sub total	29,825	-	-	29,825	31,992
A4 Asset and investment purchases. (see table)					
Purchase of CCLA Income Units	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	29,825	-	-	29,825	31,992
Net of receipts/(payments)	6,616	-	-	6,616	2706
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	25,801	-	-	25,801	23094
Cash funds this year end	32,416	-	-	32,416	25801

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 Current Account	32,416	-	-
	Total cash funds	32,416	-	-

(agree balances with receipts and payments account(s))*uncleared cheques noted below

OK

OK

OK

B2 Other monetary assets

Details	Unrestricted to nearest £	Restricted to nearest £	Endowment to nearest £
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
COIF Ethical Fund A	Endowment	561,884	843,332
COIF Property Fund	Endowment	100,000	106,213
COIF Ethical Fund B	Endowment	60,000	89,399
		-	-

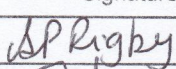
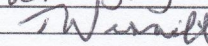
B4 Assets retained for the charity's own use

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

B5 Liabilities

Details	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
	Sue Rigby - Chair	7.3.24
	Richard Verrill - Deputy Chair	10/3/24

FRED PENDLEBURY TRUST LEGACY

England & Wales - Charity number 242863

Accounts



Trustees' Annual Report for the period

		Period start date			Period end date		
From	Day	Month	Year	To	Day	Month	Year
	1 st	November	2021		31 st	October	2022

Section A Reference and administration details

Charity name

Fred Pendlebury Trust Legacy

Other names charity is known by

-

Registered charity number (if any)

242863

Charity's principal address

CRC, 1st Floor, Penketh Methodist Church,

Chapel Road, Penketh

Warrington

Postcode

WA5 2NB

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	Mrs Sue Rigby	Chair		Appointed as a Circuit Steward of the Sankey Valley Methodist Circuit
2	Revd Mark Coles	Trustee		Appointed by the Sankey Valley Methodist Circuit as a presbyter engaged in ministry in the Warrington Unitary Authority
3	Cllr Maureen Creaghan	Mayor of Warrington	01/11/2021 – 23/05/2022	Governing document designates the incumbent Mayor as Trustee
4	Cllr Jean Flaherty	Mayor of Warrington	23/05/2022 – 31/10/2022	Governing document designates the incumbent Mayor as Trustee
5	Cllr Pamela Todd	Chair of Stockton Heath Parish Council		Governing document designates the incumbent Chair of Stockton Heath Parish Council as Trustee
6	Mr Richard Verrill	Trustee		Appointed as a Circuit Steward of the Sankey Valley Methodist Circuit
7	Mr Kenneth Long	Trustee		

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

Name	Dates acted if not for whole year
N/A	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Investment Managers	COIF	CCLA, Investment Management Limited Senator House, 85 Queen Victoria Street, London, EC4V 4ET
Bankers	The Cooperative Bank	PO Box 250, Skelmersdale, WN8 6WT

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

Grant administration and accounts – Mrs Chris Ralston

Section B Structure, governance and management

Description of the charity’s trusts

Type of governing document (eg. trust deed, constitution)	The Trust was formed, and the constitution was adopted on 18th August 1965 and subsequently amended on 20th July 1977. A new scheme was sealed on 23 September 2004, which altered the governing document of the charity. The scheme was further amended in June 2007, January 2010 and July 2015.
How the charity is constituted (eg. trust, association, company)	The Charity is constituted as a Trust.
Trustee selection methods (eg. appointed by, elected by)	<p>In accordance with the governing document five of the Trustees are appointed by virtue of the office they hold. These are:</p> <ul style="list-style-type: none"> • Two Circuit Stewards from the Sankey Valley Methodist Circuit • A presbyter from the Sankey Valley Methodist Circuit engaged in ministry within the Warrington Unitary Authority • The Mayor of Warrington • The Chair of Stockton Heath Parish Council <p>Two further trustees are appointed by the Trustees. Those trustees must be members of a Methodist Church within the Warrington Unitary Authority which forms part of the area encompassed by the Sankey Valley Methodist Circuit.</p>

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.

The Trust has strong links with the Methodist Church in the local area.

The Trust Administrator completes the day-to-day grant administration and accounting for the Trust. A contribution is made to the Circuit for office space, stationery etc.

RISK REVIEW: A Risk Assessment checklist has been produced as recommended by the Charity Commission. The Chair and Administrator undertake a review annually. Review details are duly recorded in an appropriate Register. Policies are in place governing procedures for expenses and signatories on the bank account. Any matters arising from the risk review are reported at the next Trustee Meeting.

DATA PROTECTION: The Fred Pendlebury Trust is registered with the Information Commissioners Office under the Data Protection Act 2018. Registration Number: Z104374. The handling of Data is in accordance with the requirements of the said Act.

TRUSTEES INDUCTION: Potential Trustees spend time with the Administrator, finding out about the workings of the Trust. A Trustee handbook is available for all Trustees.

FIT AND PROPER PERSONS: For the purposes of the Finance Act 2010 it is considered that all Trustees are believed to be fit and proper persons to hold the office of Trustee.

Section C

Objectives and activities

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

CHARITABLE OBJECTS: The Fred Pendlebury Trust exists primarily to grant financial help to those aged 50 and over who live within the area of the Warrington Unitary Authority. The original area of benefit being amended 23rd September 2004.

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)

The object of the Trust is for the benefit of those who are over 50 years of age and are resident in the Warrington area, in particular but not exclusively by offering grants to cover the financial costs of items such as kitchen appliances, domestic furnishings, essential repairs or decoration, access equipment, medical appliances, clothing or in some cases emergency food. The Trust also offers modest financial assistance to applicants who are in arrears or have been advised to seek a Debt Recovery Order.

Individual applicants to the Trust do not have to be pensioners or be in receipt of any kind of benefit but must be able to show some evidence of genuine need or financial hardship or distress.

There are seven Trustees who meet approximately once per month to discuss applications. There is currently a Trustee vacancy. Between meetings grants of up to £350 per applicant can be approved by the Chair and the Deputy Chair, at their discretion. Applications above this amount need to be circulated to all the Trustees with approval required from each one.

The Trust receives all its income for its charitable work from investment funds and from interest on reserves. It does not engage in fundraising activities.

During this financial year the Trustees have considered 69 grants. These were all for individuals..

All applications to the Trust are referred by agencies such as the Citizens Advice Bureau and agencies supporting vulnerable tenants in social housing.

We have received significant feedback from referral organisations and the applicants themselves advising that the items purchased with grant assistance make a huge difference to the lives of the individuals concerned.

Over the financial year the Trust has received thank you letters and emails from successful grant applicants.

With its strong Methodist connection, the Trust undertakes to bring a Christian ethos to all its work by offering a compassionate and understanding service.

The Trustees future strategy will be to consider how we meet an ever growing demand on our services and how we best equip ourselves to be able to respond to the needs generated by welfare/benefit changes.

Additional details of objectives and activities (Optional information)

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

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

CONTROL OF GRANT MAKING: Before a grant is awarded, the Administrator presents a report with all relevant details to the trustees. Subject to the agreed cash limits, the decision to award a grant is made by the trustee panel meeting to discuss the applications which meets approximately 10 times a year. Payments are made to suppliers and contractors and only in exceptional circumstances direct to a beneficiary so seeking to ensure that grants made are genuinely used according to the purpose stated on the application form.

CONTROL OF FINANCE AND INVESTMENT ASSETS: Note: The Trust employs an administrator to manage the grant making administration and financial bookkeeping and office space is provided by the Sankey Valley Methodist Circuit. A charge for services rendered by the church to the trust is made. Details of such charges are shown in the financial statements of the trust.

i) A full financial report is presented to the Trustees at their bi-annual meetings, at intervening times the financial position of the Trust is monitored by the Administrator. In the event of unforeseen expenditure, the trustees have sufficient reserves and financial control to minimise any financial risk.

ii) Assets: The Trust generates income for its charitable work from investment funds operated by CCLA, specialist investment management for charities and faith organisations. They are authorised to make investment decisions based on security rather than profit. The monies not invested in this way are temporarily held on deposit with established banks and financial institutions. The investment management team has authority to manage the investments in accordance with the Trust's ethical policy and attitude to risk.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

During this financial year the Trustees have approved grants totalling £23,488.11, of which applications totalling £1,020 were later withdrawn, as were three applications from the previous financial year totalling £1,200.

The total sum paid out was £24,494.83 (including gifts for vacuum cleaners and mattress protectors), of which £2,384.84 related to grants outstanding from previous financial years. The amount for gifts was £539.88.

	£
Cleaning	850
Decorating	164
Domestic Equipment	152
Financial Assistance	1070
Floor Coverings	9,168
Food	50
Furnishings	54
Furniture	3,224
Garden Work	485
Mattress Cover Gift	64
Mobile Devices	83
Personal Computing	628
Personal Transport	1,050
Rent	2,250
Vacuum Cleaner Gift	476
White Goods	4,377

During the year, the Trust received refunds of £147.99 for goods and services returned/not required.

Income generated from investments was £34.550.

The total investment portfolio amounted to £1,075,035 at 31st Oct 2022 (value in 2021 £1,168,662)

Section E

Financial review

Brief statement of the charity's policy on reserves

The Trust currently meets its running costs and grant awards from the interest received on its investments. The Trust keeps between 3 and 6 months cash reserves available for use for these purposes. In order to maintain these levels of cash reserves the Trustees review the grant award criteria (maximum grant and period between repeat applications) twice a year and, if necessary, adjust the grant award criteria to maintain the stated levels of cash reserves.

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.

INVESTMENT POLICY: The Charity's only source of funds is from the investment portfolio with income and interest being available for grants.

The investments of the Trust are made in accordance with Charity Commission guidelines. These include regard for UK and overseas investment and a proportion of medium risk/balanced investments and gilts.

The Trustees have adopted an ethical investment policy. This commits the Pendlebury Trust to adopting an ethical policy that prevents it from directly trading in companies that make a profit from gambling, pornography and arms manufacture and dealings.

The Trust undertakes no fund raising activities.

Other optional information

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Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s)	<i>SP Rigby</i>	<i>R Verrill</i>
Full name(s)	SUSAN PATRICIA RIGBY	RICHARD VERRILL
Position (eg Secretary, Chair, etc)	CHAIR	TRUSTEE

Date

10. 1. 23



Charity Name Fred Pendlebury Trust		No (if any) 242863
Receipts and payments accounts		
For the period from	Period start date 01/11/2021	To 31/10/2022

CC16a

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 £
A1 Receipts					
Bank Interest	-	-	-	-	-
Investment Income (after tax)	34,550	-	-	34,550	34,017
Grants Returned	148	-	-	148	380
Miscellaneous	-	-	-	-	213
Sub total (Gross income for AR)	34,698	-	-	34,698	34,610
A2 Asset and investment sales, (see table).					
Total share sales	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	34,698	-	-	34,698	34,610
A3 Payments					
Charitable Grants	24,495	-	-	24,495	23,714
Volunteer expenses/honoraria	-	-	-	-	-
Office expenses and administrator salary	7,112	-	-	7,112	6,912
Grave maintenance	200	-	-	200	200
Independent Examiner's fee	150	-	-	150	150
Miscellaneous	35	-	-	35	45
Sub total	31,992	-	-	31,992	31,021
A4 Asset and investment purchases, (see table)					
Purchase of CCLA Income Units	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	31,992	-	-	31,992	31,021
Net of receipts/(payments)	2,706	-	-	2,706	3,589
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	23,094	-	-	23,094	19,506
Cash funds this year end	25,801	-	-	25,801	23,095

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 Current Account	25,801	-	-
	Deposit Account	-	-	-
	Investment Deposit Account	-	-	-
	Total cash funds	25,801	-	-

(agree balances with receipts and payments account(s)) *uncleared cheques noted below

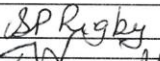

Categories	Details	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	COIF Ethical Fund	Endowment	561,884	859,644
	COIF Property Fund	Endowment	100,000	124,263
	COIF Unreserved Fund	Unrestricted	60,000	91,128
	Tilney Managed Shares	Endowment	-	-

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

Categories	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	Print Name	Date of approval
	Sue Rigby - Chair	10.1.23
	Richard Verrill - Deputy Chair	22.1.23



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Fred Pendlebury Trust Legacy

**On accounts for the year
ended**

31st. October 2022

**Charity no
(if any)**

242863

Set out on pages

Eight and nine

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31st. October 2022.

**Responsibilities and
basis of report**

As the charity trustees of the Trust, 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 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 (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn 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:

Alex A. Clements

Date:

26th February 2023

Name:

Rev'd A. A. Clements

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

Fellow of the Association of Charity Independent Examiners.

Address:

15 Carleton Road, Great Knowley, Chorley PR6 8TQ

FRED PENDLEBURY TRUST LEGACY

England & Wales - Charity number 242863

Accounts



Trustees' Annual Report for the period

		Period start date			Period end date		
From	Day	Month	Year	To	Day	Month	Year
	1 st	November	2020		31 st	October	2021

Section A Reference and administration details

Charity name Fred Pendlebury Trust Legacy

Other names charity is known by -

Registered charity number (if any) 242863

Charity's principal address CRC, 1st Floor, Bold Street Methodist Church,
Palmyra Square North, Warrington

Postcode WA1 1JQ

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	Mrs Sue Rigby	Chair		Appointed as a Circuit Steward of the Sankey Valley Methodist Circuit
2	Mr Geoff Dutton	Deputy Chair	01/11/2020 – 06/07/2021	Appointed as a Circuit Steward of the Sankey Valley Methodist Circuit
3	Revd Mark Coles	Trustee		Appointed by the Sankey Valley Methodist Circuit as a presbyter engaged in ministry in the Warrington Unitary Authority
4	Cllr Maureen Creaghan	Mayor of Warrington		Governing document designates the incumbent Mayor as Trustee
6	Cllr Laurence Murphy	Chair of Stockton Heath Parish Council	01/11/2020 – 18/05/2021	Governing document designates the incumbent Chair of Stockton Heath Parish Council as Trustee
7	Cllr Pamela Todd	Chair of Stockton Heath Parish Council	18/05/2021 - 31/10/2021	Governing document designates the incumbent Chair of Stockton Heath Parish Council as Trustee
8	Mr Richard Verrill	Trustee		
9	Mr Kenneth Long	Trustee		

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

Name	Dates acted if not for whole year
N/A	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Investment Managers	COIF	CCLA, Investment Management Limited Senator House, 85 Queen Victoria Street, London, EC4V 4ET
Bankers	The Cooperative Bank	PO Box 250, Skelmersdale, WN8 6WT

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

Grant administration and accounts – Mrs Chris Ralston

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)	The Charity is constituted as a Trust.
Trustee selection methods (eg. appointed by, elected by)	<p>In accordance with the governing document five of the Trustees are appointed by virtue of the office they hold. These are:</p> <ul style="list-style-type: none"> • Two Circuit Stewards from the Sankey Valley Methodist Circuit • A presbyter from the Sankey Valley Methodist Circuit engaged in ministry within the Warrington Unitary Authority • The Mayor of Warrington • The Chair of Stockton Heath Parish Council <p>Two further trustees are appointed by the Trustees. Those trustees must be members of a Methodist Church within the Warrington Unitary Authority which forms part of the area encompassed by the Sankey Valley Methodist Circuit.</p>

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.

The Trust has strong links with the Methodist Church in the local area and uses office space within the Sankey Valley Circuit Office for which it makes a financial contribution to the Circuit.

In addition to the Trustees, the Trust has a paid Administrator who completes the day-to-day grant administration and accounting for the Trust.

A Trustee handbook, including copies of the governing documents, is made available to new Trustees.

The Trust works closely with local social housing and support agencies and other organisations such as Citizens' Advice whose referrals form the majority of our grant applications.

Section C

Objectives and activities

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

CHARITABLE OBJECTS: The Fred Pendlebury Trust exists primarily to grant financial help to those aged 50 and over who live within the area of the Warrington Unitary Authority. The original area of benefit being amended 23rd September 2004.

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)

The object of the Trust is for the benefit of those who are over 50 years of age and are resident in the Warrington area, in particular but not exclusively by offering grants to cover the financial costs of items such as kitchen appliances, domestic furnishings, essential repairs or decoration, access equipment, medical appliances, clothing or in some cases emergency food.

Individual applicants to the Trust do not have to be pensioners or be in receipt of any kind of benefit but must be able to show some evidence of genuine need or financial hardship or distress.

There are seven Trustees who meet approximately once per month to discuss applications. Between meetings grants of up to £350 per applicant can be approved by the Chair and the Deputy Chair, at their discretion. Applications above this amount need to be circulated to all the Trustees with approval required from each one.

The Trust receives all its income for its charitable work from investment fund. It does not engage in fundraising activities.

During this financial year the Trustees have considered 87 grants. These were all for individuals. At the AGM in January 2014, the Trustees agreed a match funding scheme with Warrington Borough Council for small works for homeowners. The Trust has received no applications this financial year. At a meeting in January 2019, the Trustees agreed that money would be put aside each month for this purpose, but that the arrangement would only run

for a further 2 financial years. This period has now lapsed, so any monies accrued for the matched funding have now reverted to the main account.

The majority of the Trust's applications are referred by agencies such as the Citizens Advice Bureau and agencies supporting vulnerable tenants in social housing. Four applications this year were self-referrals from the general public.

We have received significant feedback from referral organisations advising that the items purchased with grant assistance make a huge difference to the lives of the individuals concerned.

Over the financial year the Trust has received thank you letters and emails from successful grant applicants.

With its strong Methodist connection, the Trust undertakes to bring a Christian ethos to all its work by offering a compassionate and understanding service.

The Trustees future strategy will be to consider how we meet an ever growing demand on our services and how we best equip ourselves to be able to respond to the needs generated by welfare/benefit changes.

Additional details of objectives and activities (Optional information)

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

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

CONTROL OF GRANT MAKING: Before a grant is awarded, the Administrator presents a report with all relevant details to the trustees. Subject to the agreed cash limits, the decision to award a grant is made by the trustee panel meeting to discuss the applications. Payments are made to suppliers and contractors and only in exceptional circumstances direct to a beneficiary so seeking to ensure that grants made are genuinely used according to the purpose stated on the application form.

CONTROL OF FINANCE AND INVESTMENT ASSETS: Note: The Trust employs an administrator to manage the grant making administration and financial bookkeeping and office space is provided by the Sankey Valley Methodist Circuit. A charge for services rendered by the church to the trust is made. Details of such charges are shown in the financial statements of the trust.

i) A full financial report is presented to the Trustees at their bi-annual meetings, at intervening times the financial position of the Trust is monitored by the Administrator. In the event of unforeseen expenditure, the trustees have sufficient reserves and financial control to minimise any financial risk.

ii) Assets: The Trust generates income for its charitable work from investment funds operated by CCLA, specialist investment management for charities and faith organisations. They are authorised to make investment decisions based on security rather than profit. The monies not invested in this way are temporarily held on deposit with established banks and financial institutions. The investment management team has authority to manage the investments in accordance with the Trust's ethical policy and attitude to risk.

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

During this financial year the Trustees have approved grants totalling £21,909.06, of which applications totalling £2,804.11 were later withdrawn, as were two applications from the previous financial year totalling £700.

The total sum paid out was £23,646.93 (including gifts for vacuum cleaners and mattress protectors), of which £3,214.02 related to grants outstanding from previous financial years. The amount for gifts was £703.85.

	£
Building Work	350
Domestic Equipment	64
Financial Assistance	450
Fitting	100
Floor Coverings	10,692
Furniture	479
Garden Work	350
Heating & Lighting	580
Mattress Cover Gift	18
Mobile Devices	199
Personal Transport	850
Removal and Storage	350
Rent	350
Repairs and Renewals	68
Special Equipment	793
Vacuum Cleaner Gift	686
White Goods	7,296

During the year, the Trust received refunds of £380 for goods and services returned/not required.

Income generated from investments was £34,017.

The total investment portfolio amounted to £1,168,662 at 31st Oct 2021 (value in 2020 £993,202)

In April 2017, Glanmore Properties were partially liquidated, and the Trust received a further cheque in March 2018 for £289. These shares were not sold off with the other shares in 2014 because of the massive drop in value. In March 2021 the final liquidation payment of £13.19 was made to the Trust

Brief statement of the charity's policy on reserves

The Trust currently meets its running costs and grant awards from the interest received on its investments. The Trust keeps between 3 and 6 months cash reserves available for use for these purposes.

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.

The Charity's principal source of funds is the income generated by the Trust's investment funds. The investments cannot be sold for additional income without permission from the Charity Commission.

The Trustees have adopted an ethical investment policy and, as such, has invested its funds through CCLA Investment Management.

The Trust undertakes no fund raising activities.

Other optional information

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Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s)	<i>SP Rigby</i>	<i>R Verill</i>
Full name(s)	SUSANPATRICA RIGBY	RICHARD VERILL
Position (eg Secretary, Chair, etc)	CHAIR	DEPUTY CHAIR
Date	9 Feb 2022	



Charity Name Fred Pendlebury Trust		No (if any) 242863
Receipts and payments accounts		
For the period from	Period start date 01/11/2020	To Period end date 31/10/2021

CC16a

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 £
A1 Receipts					
Bank Interest	-	-	-	-	-
Investment income (after tax)	34,017	-	-	34,017	33,841
Grants Returned	380	-	-	380	414
Miscellaneous	213	-	-	213	-
Sub total (Gross income for AR)	34,610	-	-	34,610	34,255
A2 Asset and investment sales, (see table).					
Total share sales	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	34,610	-	-	34,610	34,255
A3 Payments					
Charitable Grants	23,714	-	-	23,714	16,015
Volunteer expenses/honoraria	-	-	-	-	-
Office expenses and administrator salary	6,912	-	-	6,912	6,562
Grave maintenance	200	-	-	200	200
Independent Examiner's fee	150	-	-	150	150
Miscellaneous	45	-	-	45	115
Sub total	31,021	-	-	31,021	23,042
A4 Asset and investment purchases. (see table)					
Purchase of CCLA Income Units	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	31,021	-	-	31,021	23,042
Net of receipts/(payments)	3,589	-	-	3,589	11,213
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	19,506	-	-	19,506	8,293
Cash funds this year end	23,094	-	-	23,094	19,506

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 Current Account	23,094	-	-
	Deposit Account	-	-	-
	Investment Deposit Account	-	-	-
	Total cash funds	23,094	-	-

(agree balances with receipts and payments account(s)) uncleared cheques noted below

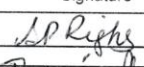
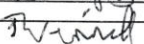
Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	COIF Ethical Fund	Endowment	561,884	947,258
	COIF Property Fund	Endowment	100,000	120,988
	COIF Unreserved Fund	Unrestricted	60,000	100,416
	Tilney Managed Shares	Endowment	-	-

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

Categories	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	Print Name	Date of approval
	Sue Rigby - Chair	16.2.22
	Richard Verrill - Deputy Chair	18/2/22



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
Fred Pendlebury Trust Legacy

**On accounts for the year
ended**

31st. October 2021

**Charity no
(if any)**

242863

Set out on pages

Eight and Nine

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31st. October 2021'

**Responsibilities and
basis of report**

As the charity trustees of the Trust, 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 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 (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn 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:

Alex A Clements

Date:

24/02/2022

Name:

Rev'd A. A. Clements

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

Fellow of the Association of Charity Independent Examiners.

Address:

15 Carleton Road, Great Knowley, Chorley PR6 8TQ