

# JULIA MARY WOOD CHARITABLE TRUST

England & Wales · Charity number 247497

## Details

---

**Other names** THE LADY JULIA WOOD CHARITABLE TRUST

**Status** Registered

**Legal form** Trust

**Registered** 1966-04-13

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

## Contact

---

**Address** Woodside  
Hammersley Lane  
Penn  
High Wycombe  
Buckinghamshire  
HP10 8HG

**Phone** 07966 544567

**Email** [trustees@jmwct.org](mailto:trustees@jmwct.org)

## Activities

---

**Objects:** SUCH CHARITABLE OBJECT OR CHARITABLE OBJECTS AS THE TRUSTEES MAY IN THEIR ABSOLUTE DISCRETION FROM TIME TO TIME SELECT.

**Activities:** Charitable donations to The Young, The Elderly, Health Care and Animals in the areas of Buckinghamshire, Berkshire and Oxfordshire.

## Classification

---

- **How:** Makes Grants To Organisations
- **What:** General Charitable Purposes, Education/training, The Advancement Of Health Or Saving Of Lives, Disability, Animals
- **Who:** Children/young People, Elderly/old People, People With Disabilities, Other Charities Or Voluntary Bodies

## Geography

---

- **Area of benefit:** NATIONAL.
- Buckinghamshire
- Oxfordshire
- West Berkshire

## Finances

---

Period end	Income	Expenditure	Assets	Employees
2025-04-05	£33,085	£15,446	-	-
2024-04-05	£19,717	£14,949	-	-
2023-04-05	£17,479	£14,928	-	-
2022-04-05	£17,239	£27,396	-	-
2021-04-05	£17,190	£14,922	-	-

## Trustees

---

Name	Role	Appointed
ANTHONY MALONE		2024-02-21
Tracey Karen Malone		2025-06-23

**JULIA MARY WOOD CHARITABLE TRUST**

England & Wales - Charity number 247497

---

# Accounts

---

**Charity Commission  
Reference Number 247497**

**Trustees of the Lady Julia Wood Charitable Trust**

**Accounts**

**for the year ended 5 April 2025**

**Trustees of the Lady Julia Wood Charitable Trust  
Trust Report for the Year Ended 5 April 2025**

**Names and Addresses of Trustees**

Anthony Michael Malone  
Woodside  
Hammersley Lane  
Penn  
Buckinghamshire  
HP10 8HG

Tracey Karen Malone - Appointed 23 June 2025  
Woodside  
Hammersley Lane  
Penn  
Buckinghamshire  
HP10 8HG

Stuart Roderick James Leitch - Deceased 27 June 2025  
4 Chipperfield House  
Hampden Road  
Chalfont st Peter  
Buckinghamshire  
SL9 9DP

## **TRUSTEES OF THE LADY JULIA WOOD CHARITABLE TRUST**

### **Objects of the Trust**

The Lady Wood Charitable Trust (in the Settlement Deed called the Julia Wood Charitable Trust) was established by a Settlement Deed dated 10<sup>th</sup> January 1966. The Trustees hold the capital and income of the Trust upon charitable trusts for such charitable objects as the Trustees may at their absolute discretion from time to time select and in carrying out such trusts the Trustees shall in addition to all statutory and other powers have power from time to time in their absolute discretion to pay or transfer any part of the income or capital of the Trust Fund to the governing body of any charity for the general purposes of such charity provided that the Trustees shall not in any year (a year being deemed to commence from the date of the Settlement Deed and any anniversary thereof) distribute capital having a total value of more than one tenth of the value of the Trust Fund at the commencement of such year.

**Trustees of the Lady Julia Wood Charitable Trust  
Trust Report for the year ended 5 April 2025**

**Balance Sheet as at 5 April 2025**

	Pages	<u>2025</u> £	<u>2024</u> £
Capital Account	4	471,242.80	449,608.19
Accumulated Income Account	4	158,320.30	140,680.94
		<u>£ 629,563.10</u>	<u>£ 590,298.13</u>
Represented by:			
Investments at cost			
Market value: £599,198			
(2024: £619,068)		600,441.00	548,530.88
Accrued Income		34.68	23.16
Balance at Bank		12,070.77	1,172.17
Cash on deposit with Rathbone Investment Management Limited		18,491.65	41,937.92
		<u>631,038.10</u>	<u>591,664.13</u>
Less: Creditors		1,475.00	1,375.00
		<u>£ 629,563.10</u>	<u>£ 590,289.13</u>

3

.....  
Mr A M Malone  
Trustee

.....  
Mrs T K Malone  
Trustee

## Trustees of the Lady Julia Wood Charitable Trust

### Trust Report for the year Ended 5 April 2025

#### Capital Account

	<u>2025</u> £	<u>2024</u> £
Balance as at 5 April 2024	449,608.13	433,272.31
Add:		
Net profit/(loss) on sale of investments	21,634.67	16,335.88
Balance as at 5 April 2025	<u>£ 471,242.80</u>	<u>£ 449,608.13</u>

#### Accumulated Income Account

	<u>2025</u> £	<u>2024</u> £
Balance as at 6 April 2024	140,680.94	135,912.85
Add:		
Surplus for the year ended 5 April 2025	5      17,639.36	4,768.09
Balance as at 6 April 2025	<u>£ 158,320.30</u>	<u>£ 140,680.94</u>

**Trustees of the Lady Julia Wood Charitable Trust**

**Trust Report for the year ended 5 April 2025**

**Income Account for the year ended 5 April 2025**

	<u>2025</u> £	<u>2024</u> £
Income from investments	32,784.82	19,717.82
Donations received	300.00	
Less :Donations	<i>12,000.00</i>	<i>12,000.00</i>
Less: Administrative Charges		
Insurance	<i>246.40</i>	
Other	<i>55.00</i>	
Investment management fees	<i>1,944.06</i>	<i>1,839.73</i>
Accountancy charges	<i>1,200.00</i>	<i>1,110.00</i>
	<hr/> <i>15,445.46</i>	<hr/> <i>14,949.73</i>
Surplus for the year ended 5 April 2025	<hr/> <u>£ 17,639.36</u>	<hr/> <u>£ 4,768.09</u>