

Charity Registration No. 261387

**THE BALINT SOCIETY**  
**ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 MARCH 2024**



# THE BALINT SOCIETY

## CONTENTS

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	<b>Page</b>
Trustees' report	1 - 3
Statement of trustees' responsibilities	4
Independent examiner's report	5
Statement of financial activities	6
Balance sheet	7
Notes to the financial statements	8 - 14

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# THE BALINT SOCIETY

## LEGAL AND ADMINISTRATIVE INFORMATION

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### Trustees

Dr A Evans  
Dr A Patterson  
Dr V Luthra  
Dr R Soreanu  
Dr M King  
Dr C Brown (Appointed 1 December 2023)  
  
Dr A Kyrris (Appointed 1 December 2023)  
  
Dr A Gledhill (Appointed 1 December 2023)

### Charity number

261387

### Independent examiner

Azets Audit Services  
First Floor  
Unit 55 Ffordd William Morgan  
St Asaph Business Park  
St Asaph  
United Kingdom  
LL17 0JG

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# THE BALINT SOCIETY

## TRUSTEES' REPORT

### *FOR THE YEAR ENDED 31 MARCH 2024*

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The Trustees present their annual report and financial statements for the year ended 31 March 2024.

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the charity's [governing document], the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (effective 1 January 2019).

#### **Objectives and activities**

The objectives and aims of the Society are to promote and advance discussion groups using the Balint method, and research and studies on the psychological aspects of health and social care, with special reference to the professional-patient/client relationship and to disseminate this knowledge beyond the Society for the improvement of the care of the public at large.

To provide an opportunity for the study of similar problems as experienced by members of branches of other helping professions and in this connection to support and promote Balint Groups of the type already established in this country and elsewhere;

To promote the effective delivery of supervision, training, and education of the Balint model within the UK Balint society and to continue to foster links with the International Balint Federation

To strengthen the crucial support infrastructure of the UK Balint society which will include developing and maintaining a) a robust IT platform and b) the administrative function;

To further our engagement with all our members of the Balint society and by doing so we aim to understand a) our current members' needs, b) the equality and diversity of the society and c) develop further Balint society events within the UK;

To ensure the foundations laid down by Michael Balint and the subsequent Balint model are maintained along with taking the society into the future.

#### **Public Benefit**

The Balint Society benefits the public by working with health care professionals in the protected time and space of Balint Groups, thus providing an opportunity for experiential learning and reflection on the clinician-patient relationship

#### **Achievements and performance**

Membership: Between 1<sup>st</sup> December 2023 up to the writing of this report, there have been 64 new members to the Balint Society. This demonstrates the ongoing interest in Balint groups, and we hope this number continues to grow over the next year.

We will continue to explore the equality and diversity of the society in 2025. We would appreciate members involvement with this crucial work.

We are in process of reviewing the Balint Society events in order to meet our members needs. We are pleased that the December 2024 Leeds study event was sold out by early November 2024.

# THE BALINT SOCIETY

## TRUSTEES' REPORT (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2024

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Website: Although there may be ongoing work, we are delighted that the new website is up and running. This has been a huge project, and we are immensely grateful to Eamonn Marshall and Jon from Turtle Reality.

We are grateful to Joanne Etches (Balint Society administrator, as mentioned above for all her ongoing work in supporting the society's daily functioning. We are in the process of reviewing the role of administrator to reflect the increase in intensity of the workload

#### **Training and education**

a: Training & Education (T&E) group chaired by Shake Siegel. This group continues to meet regularly throughout the year and comprises all Council members and representatives from each of the other committees. Through Shake's leadership we have managed to have several discussions around accreditation and supervision. One outcome of this is to set up a supervision training event for 2025.

b: Supervisor accreditation criteria. The accreditation committee has devised long awaited criteria for Balint supervisors. We are very grateful for their thoughtful and rigorous input. The criteria have now been discussed in T&E and ratified by council and will hopefully offer a robust framework and assurance for supervisors and supervisees alike.

We would like to thank the previous chair, Judy Malone, for all her hard work over the years.

We are also pleased that Chris Douglas and Liz Lee have successfully taken over the role of joint-chair.

c: Due to the ever-increasing numbers on the accreditation pathway, we have initiated a further two Balint society funded supervision groups led by 1) Linda Mary Edwards and Ann Evans and 2) Jane Mulholland and Dave Morgan, to support with this demand. We would like to thank all the leaders involved in this project. Feedback from the previous groups has been positive.

There have been 14 new accredited leaders in 2024 compared to 18 new leaders in 2023. We will be monitoring the trajectory of our new leaders over the upcoming year to see whether the criteria continue to be achievable.

d: International Balint Federation. We are pleased to announce our new IBF council link Chris Brown. We hope to continue fostering links with the IBF. We would also like to thank Esti Rimmer for all her continuing work in her role on the IBF taskforce. Members are warmly recommended to attend IBF events.

#### **Financial review**

##### **Income**

This is derived from membership subscriptions, events, occasional donations and some investment income. The total for 2024 amounted to £80,703 (restated 2023; £77,597).

##### **Expenditure**

Expenditure for the year ended 31st March 2024 was monitored, controlled and increased as appropriate.

Unrestricted incoming resources amounted to £80,703 (restated 2023; £76,597) and total unrestricted resources expended amounted to £79,745 (2023; £84,321) resulting in an unrestricted surplus for the year of £958 (deficit 2023; £6,724) after investment valuation movement.

There were no restricted incoming resources this year, (2023; £1,000), with no restricted expenditure, resulting in a restricted surplus for the year of £Nil (2023: £1,000).

It is the policy of the charity that unrestricted funds which have not been designated for a specific use should be maintained at a level equivalent to between three and six month's expenditure. The Trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. This level of reserves has been maintained throughout the year.

# THE BALINT SOCIETY

## TRUSTEES' REPORT (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2024

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

#### Plans for future periods

We hope that the revised accreditation and supervision criteria, our renewed link with the IBF and the new website have contributed to maintaining the growth of the society for the future.

#### Structure, governance and management

The charity is controlled by its governing document, a deed of trust and constitutes an unincorporated entity. The Trustees who served during the year and up to the date of signature of the financial statements were:

Dr A Evans	
Mr E Marshall	(Resigned 1 December 2023)
Dr J Malone	(Resigned 1 December 2023)
Dr A Patterson	
Dr S Chudley	(Resigned 6 December 2024)
Dr S Tankard	(Resigned 1 December 2023)
Dr V Luthra	
Dr S Perera	(Resigned 1 December 2023)
Dr R Soreanu	
Dr M King	
Dr C Brown	(Appointed 1 December 2023)
Dr A Kyrris	(Appointed 1 December 2023)
Dr A Gledhill	(Appointed 1 December 2023)

The trustees' report was approved by the Board of Trustees.



.....  
Dr V Luthra  
**Trustee**

Date: ..17th April 2025.....

# THE BALINT SOCIETY

## STATEMENT OF TRUSTEES' RESPONSIBILITIES

***FOR THE YEAR ENDED 31 MARCH 2024***

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The Trustees are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that year.

In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The Trustees are responsible for keeping sufficient accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

# THE BALINT SOCIETY

## INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE BALINT SOCIETY

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I report to the Trustees on my examination of the financial statements of The Balint Society (the charity) for the year ended 31 March 2024.

### Responsibilities and basis of report

As the Trustees of the charity you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities Act 2011 (the 2011 Act).

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

### Independent examiner's statement

Your attention is drawn to the fact that the charity has prepared financial statements in accordance with Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) in preference to the Accounting and Reporting by Charities: Statement of Recommended Practice issued on 1 April 2005 which is referred to in the extant regulations but has now been withdrawn.




I understand that this has been done in order for financial statements to provide a true and fair view in accordance with Generally Accepted Accounting Practice effective for reporting periods beginning on or after 1 January 2015.

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 financial statements do not accord with those records; or
- 3 the financial statements 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 financial statements to be reached.

Jonathan Ward FCA  
Azets Audit Services  
First Floor  
Unit 55 Ffordd William Morgan  
St Asaph Business Park  
St Asaph  
LL17 0JG  
United Kingdom

Dated: 22/04/2024.



# THE BALINT SOCIETY

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 MARCH 2024

		Unrestricted funds 2024	Restricted funds 2024	Total 2024	Unrestricted funds restated 2023	Restricted funds 2023	Total 2023
		£	£	£	£	£	£
<b><u>Income from:</u></b>							
Donations and legacies	3	-	-	-	-	1,000	1,000
Charitable activities	4	80,063	-	80,063	75,119	-	75,119
Investment Income	5	640	-	640	1,478	-	1,478
<b>Total income</b>		<b>80,703</b>	<b>-</b>	<b>80,703</b>	<b>76,597</b>	<b>1,000</b>	<b>77,597</b>
<b><u>Expenditure on:</u></b>							
Expenditure on charitable activities	6	85,142	-	85,142	78,201	-	78,201
Net gains/(losses) on investments	9	5,397	-	5,397	(6,120)	-	(6,120)
<b>Net income/(expenditure) for the year/</b>							
<b>Net movement in funds</b>		<b>958</b>	<b>-</b>	<b>958</b>	<b>(7,724)</b>	<b>1,000</b>	<b>(6,724)</b>
Fund balances at 1 April 2023							
As originally reported		157,999	1,000	144,351	159,317	-	147,872
Prior year adjustment		(14,648)	-	(14,648)	(11,445)	-	(11,445)
As restated		143,351	1,000	129,703	147,872	-	136,427
<b>Fund balances at 31 March 2024</b>		<b>129,661</b>	<b>1,000</b>	<b>130,661</b>	<b>128,703</b>	<b>1,000</b>	<b>129,703</b>

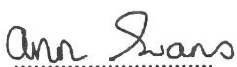
# THE BALINT SOCIETY

## BALANCE SHEET

AS AT 31 MARCH 2024

		2024		2023 - restated	
	Notes	£	£	£	£
<b>Fixed assets</b>					
Investments	11		102,904		96,867
<b>Current assets</b>					
Debtors	12	785		316	
Cash at bank and in hand		51,037		47,858	
		<u>51,822</u>		<u>48,174</u>	
<b>Creditors: amounts falling due within one year</b>	13	<u>(24,065)</u>		<u>(15,338)</u>	
Net current assets			<u>27,757</u>		<u>32,836</u>
<b>Total assets less current liabilities</b>			<u>130,661</u>		<u>129,703</u>
<b>Income funds</b>					
Restricted funds	15		1,000		1,000
Unrestricted funds			<u>129,661</u>		<u>128,703</u>
			<u>130,661</u>		<u>129,703</u>

The financial statements were approved by the Trustees on 17th April 2025.....



Dr A Evans  
Trustee

# THE BALINT SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS

### FOR THE YEAR ENDED 31 MARCH 2024

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#### **1 Accounting policies**

##### **1.1 Accounting convention**

The financial statements have been prepared in accordance with the charity's [governing document], the Charities Act 2011, FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS 102") and the Charities SORP "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (effective 1 January 2019). The charity is a Public Benefit Entity as defined by FRS 102.

The charity has taken advantage of the provisions in the SORP for charities not to prepare a Statement of Cash Flows.

The financial statements have been prepared under the historical cost convention with the exception of investments which are included at market value, as modified by the revaluation of certain assets.

##### **1.2 Prior period error**

The financial statements include adjustments relating to the prior year.

The membership income covers a period of one year from the date of receipt, therefore an adjustment to defer the appropriate portions has been included for the prior two years to ensure income is included in the correct financial years.

##### **1.3 Going concern**

At the time of approving the financial statements, the Trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

##### **1.4 Charitable funds**

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

##### **1.5 Income**

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Membership fees are recognised on receipt. There are three types; ordinary, student and honorary.

##### **1.6 Expenditure**

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

##### **1.7 Fixed asset investments**

Fixed asset investments are initially measured at cost and subsequently measured at cost less any accumulated impairment losses. The investments are assessed for impairment at each reporting date and any impairment losses or reversals of impairment losses are recognised immediately in net income/(expenditure) for the year.

# THE BALINT SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2024

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#### 1 Accounting policies

(Continued)

##### 1.8 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks and other short-term liquid investments with original maturities of three months or less.

##### 1.9 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the charity's balance sheet when the charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

##### **Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

##### **Basic financial liabilities**

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

##### **Derecognition of financial liabilities**

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

##### 1.10 Taxation

The charity is exempt from tax on its charitable activities.

# THE BALINT SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

### 2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

There are no critical accounting estimates or judgements.

### 3 Donations and legacies

	Total	Restricted funds
	2024	2023
	£	£
Legacies receivable	-	1,000

### 4 Charitable activities

	2024	2023
	£	£
Income from charitable activities	80,063	75,119

### 5 Investment Income

	Unrestricted funds	Unrestricted funds
	2024	2023
	£	£
Income from unlisted investments	206	73
Interest receivable	434	1,405
	640	1,478

# THE BALINT SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2024

### 6 Expenditure on charitable activities

	2024 £	2023 £
Expenditure on charitable activities	80,740	77,020
Share of support costs (see note 7)	1,486	445
Share of governance costs (see note 7)	2,916	736
	<u>85,142</u>	<u>78,201</u>

### 7 Support costs

	Support costs £	Governance costs £	2024 £	Support costs £	Governance costs £	2023 £
Insurance	415	-	415	415	-	415
Bank charges and interest	1,071	-	1,071	30	-	30
Audit and Accountancy	-	2,916	2,916	-	736	736
	<u>1,486</u>	<u>2,916</u>	<u>4,402</u>	<u>445</u>	<u>736</u>	<u>1,181</u>
Analysed between Charitable activities	<u>1,486</u>	<u>2,916</u>	<u>4,402</u>	<u>445</u>	<u>736</u>	<u>1,181</u>

Governance costs includes payments to the accountants of £1,716 (2023- £736) for 2024 accountancy and independent examination fees.

### 8 Trustees

Payments made to trustees for reimbursements of expenses and for leading groups at study days and workshops, and for website expenses, amounted to £8,594 for the year ended 31 March 2024. (2023; £10,557).

Leading groups at study days - £3,307  
Website expenses - £4,320  
Reimbursement of expenses - £967

# THE BALINT SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2024

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### 9 Net gains/(losses) on investments

	Unrestricted funds	Unrestricted funds
	2024	2023
	£	£
Gain/(loss) on sale of investments	5,397	(6,120)

### 10 Taxation

The charity is exempt from tax on income and gains falling within section 505 of the Taxes Act 1988 or section 252 of the Taxation of Chargeable Gains Act 1992 to the extent that these are applied to its charitable objects.

# THE BALINT SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2024

### 11 Fixed asset investments

	Listed Investments £
<b>Cost or valuation</b>	
At 1 April 2023	96,867
Valuation changes	5,397
Interest	434
Dividends	206
	<hr/>
At 5 April 2024	102,904
	<hr/>
<b>Carrying amount</b>	
At 31 March 2024	102,904
	<hr/> <hr/>
At 31 March 2023	96,867
	<hr/> <hr/>

The above valuation is per the latest valuation reports as at 05 April 2024.

### 12 Debtors

	2024 £	2023 £
Debtors	701	220
Prepayments	84	96
	<hr/>	<hr/>
	785	316
	<hr/> <hr/>	<hr/> <hr/>

### 13 Creditors: amounts falling due within one year

	Notes	2024 £	2023 £
Deferred income	14	15,199	14,648
Other creditors		7,150	-
Accruals and deferred income		1,716	690
		<hr/>	<hr/>
		24,065	15,338
		<hr/> <hr/>	<hr/> <hr/>

### 14 Deferred income

	2024 £	2023 £
Other deferred income	15,199	14,648
	<hr/> <hr/>	<hr/> <hr/>



# THE BALINT SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2024

### 14 Deferred income

(Continued)

Deferred income is included in the financial statements as follows:

	2024 £	2023 £
Deferred income is included within:		
Current liabilities	15,199	14,648
Movements in the year:		
Deferred income at 1 April 2023	14,648	11,445
Released from previous periods	(14,648)	(11,445)
Resources deferred in the year	15,199	14,648
Deferred income at 31 March 2024	15,199	14,648

### 15 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Movement in funds		Movement in funds	
	Incoming resources £	Balance at 1 April 2023 £	Incoming resources £	Balance at 31 March 2024 £
Don Bryant Legacy	1,000	1,000	-	1,000

Don Bryant Legacy: Fund to support students in furthering their understanding of Balint work

### 16 Analysis of net assets between funds

	Unrestricted funds 2024 £	Restricted funds 2024 £	Total Unrestricted funds 2024 £	Restricted funds 2023 £	Total 2023 £
Fund balances at 31 March 2024 are represented by:					
Investments	102,904	-	102,904	96,867	96,867
Current assets/(liabilities)	26,757	1,000	27,757	31,836	32,836
	129,661	1,000	130,661	1,000	129,703

### 17 Related party transactions

There were no disclosable related party transactions during the year (2023 - none), with the exception of those disclosed in Note 8.

