

# UNITARIAN CHAPEL TRUST PROPERTY

England & Wales · Charity number 262249

## Details

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**Other names** FRAMLINGHAM UNITARIAN TRUST

**Status** Registered

**Legal form** Other

**Registered** 1971-04-13

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

## Contact

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**Address** Bridge Street  
Framlingham  
Woodbridge  
Suffolk  
IP13 9AJ

**Phone** 07793986578

**Email** [secretary@framlingham-unitarians.org](mailto:secretary@framlingham-unitarians.org)

**Website** [www.framlingham-unitarians.org](http://www.framlingham-unitarians.org)

## Activities

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**Objects:** TO AND FOR THE UPKEEP OF THE MINISTRY IN THE FRAMLINGHAM MEETING HOUSE OR TO AND FOR SUCH OTHER PIOUS AND CHARITABLE USES AND PURPOSES AS THE TRUSTEES SHALL THINK FIT.

**Activities:** Provide a Meeting House for the Unitarian ministry in Framlingham. Provide a Unitarian Minister. Maintain a Grade II building of historic importance. Provide Pastoral care to the congregation. Provide a cultural venue and centre in Framlingham for use by the local community.

## Classification

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- **How:** Provides Other Finance, Provides Buildings/facilities/open Space
- **What:** General Charitable Purposes, Accommodation/housing, Religious Activities, Recreation, Other Charitable Purposes
- **Who:** Children/young People, Elderly/old People, People With Disabilities, People Of A Particular Ethnic Or Racial Origin, The General Public/mankind

## Geography

- **Area of benefit:** FRAMLINGHAM
- Suffolk

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-09-30	£59,997	£70,045	-	-
2024-09-30	£66,528	£67,915	-	-
2023-09-30	£67,151	£78,364	-	-
2022-09-30	£64,986	£58,768	-	-
2021-09-30	£55,049	£53,579	-	-

## Trustees

Name	Role	Appointed
<b>Persephone Booth</b>	Chair	2014-03-31
Alexander John Bates		2026-03-09
Elizabeth Kingston		2026-03-09
JOHN ALEXANDER MCEWAN		2007-09-04
Martin Croucher		2014-03-31
Robert Eric Booth		2023-04-24
The British and Foreign Unitarian Association (Incorporated)		
Wendy Elizabeth Sudbury		2026-03-09

**UNITARIAN CHAPEL TRUST PROPERTY**

England & Wales - Charity number 262249

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# Accounts

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**Framlingham Unitarian Trust**

**Unitarian Chapel Trust Property  
Known as "Framlingham Unitarian Trust"  
Charity No. 262249**

**Accounts for the year ending 30th September 2025**

## Framlingham Unitarian Trust

### Contents

Trust Information	Page 1
Statement of Financial Activities	Page 2
Balance Sheet	Page 3
Notes to the Financial Statements	Page 4-5
Independent Examiners Report	Page 6
Trustees Information	Page 7-8
Chairmans Report Page	Page 9-10

**Framlingham Unitarian Trust**  
**Trust Information**

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TREASURER: Mr Rob Booth  
The Timbers  
Church Road  
Kettleburgh  
Nr Woodbridge  
Suffolk  
IP13 7LE

SECRETARY & CONTACT: Mrs Carly Holland  
4 Smiths Close  
Worlingworth  
Nr Woodbridge  
Suffolk  
IP13 7JG

CHARITY NUMBER: 262249

ACCOUNTANTS: Robina Wilkes FIAB  
RWAS  
62 Quilter Road  
Felixstowe  
Suffolk  
IP11 7JL

Framlingham Unitarian Trust  
Statement of Financial Activities  
For the year ending 30th September 2025

Incoming Resources	Notes	2025			2024		
		Unrestricted £	Restricted £	Totals £	Unrestricted £	Restricted £	Totals £
Income from investments							
Finn investment dividends		35,897	-	35,897	36,965	-	36,965
COIF interest		1,769	-	1,769	2,126	-	2,126
Hire		3,402	-	3,402	3,166	-	3,166
Donations / Grants / Fees		355	-	355	170	-	170
Congregation monies	3	-	827	827	(1,000)	1,855	855
Special collections / Café Connect		-	1,747	1,747	-	1,246	1,246
Sale of furniture		-	-	-	-	-	-
Fram contribution		(32,000)	32,000	-	(22,000)	22,000	-
Rent - 15 Bridge Street (From Fram)		5,000	(5,000)	-	3,000	(3,000)	-
Bury St Edmunds contribution		-	16,000	16,000	-	22,000	22,000
Rent - 15 Bridge Street (From Bury)		2,500	(2,500)	-	3,000	(3,000)	-
<b>Total Incoming Resources</b>		<b>16,923</b>	<b>43,074</b>	<b>59,997</b>	<b>25,427</b>	<b>41,101</b>	<b>66,528</b>
<b>Resources Expended</b>							
Insurance		1,983	-	1,983	1,759	-	1,759
Wages		6,621	-	6,621	7,680	-	7,680
Repairs and maintenance		8,102	-	8,102	10,721	-	10,721
Organ and piano repairs		324	-	324	247	-	247
Accounting		1,750	-	1,750	1,357	-	1,357
Professional fees		790	-	790	1,291	-	1,291
Marketing		93	-	93	24	-	24
Travel expenses		24	-	24	47	-	47
Utilities		3,416	-	3,416	2,926	-	2,926
Miscellaneous expenses		1,443	-	1,443	1,335	-	1,335
Ministry expenses	4	-	41,132	41,132	-	37,133	37,133
Rental property expenses		863	-	863	364	-	364
Charitable donations / Café Connect / Warm Spaces		100	1,813	1,913	250	1,200	1,450
Congregation expenses	3	-	1,592	1,592	-	1,582	1,582
<b>Total Resources Expended</b>		<b>25,509</b>	<b>44,537</b>	<b>70,045</b>	<b>28,000</b>	<b>39,915</b>	<b>67,915</b>
<b>Net Incoming Resources</b>		<b>(8,585)</b>	<b>(1,463)</b>	<b>(10,048)</b>	<b>(2,573)</b>	<b>1,186</b>	<b>(1,387)</b>
Gains / (Loss) on investments		46,506	-	46,506	120,980	-	120,980
Depreciation on assets		(757)	-	(757)	(757)	-	(757)
<b>Net Movement in Funds</b>		<b>37,163</b>	<b>(1,463)</b>	<b>35,701</b>	<b>117,650</b>	<b>1,186</b>	<b>118,836</b>
Balances brought forward 01 October 2024		1,745,912	7,176	1,753,088	1,628,262	5,990	1,534,252
Change in valuation of organ		109,000	-	109,000	-	-	-
30 September 2025 C/f		<b>1,892,075</b>	<b>5,714</b>	<b>1,897,789</b>	<b>1,745,912</b>	<b>7,176</b>	<b>1,753,088</b>
General fund		1,892,075	-	1,892,075	1,745,912	-	1,745,912
Congregation funds	3	-	(116)	(116)	-	648	648
Ministry funds	4	-	5,830	5,830	-	6,462	6,462
Special collection	5	-	-	-	-	56	66
Balances carried forward 30 September 2025 C/f		<b>1,892,075</b>	<b>5,714</b>	<b>1,897,789</b>	<b>1,745,912</b>	<b>7,176</b>	<b>1,753,088</b>

**Framlingham Unitarian Trust**  
**Balance Sheet**  
**As at 30th September 2025**

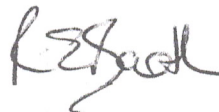
	Notes	2025 £	2024 £
<b>Fixed Assets</b>	1		
Freehold property		385,000	385,000
Fixtures & fittings		124,210	15,967
Investments		1,330,652	1,284,146
		<u>1,839,862</u>	<u>1,685,113</u>
<b>Current Assets</b>			
Debtors / (Prepayments)		111	586
CBF deposits		34,570	42,737
Barclays Current account		16,084	15,587
Petty cash account		508	117
Barclays Ministry account		10,430	10,175
		<u>61,703</u>	<u>69,202</u>
<b>Current Liabilities</b>			
Creditors / Accruals	2	<u>(3,776)</u>	<u>(1,227)</u>
<b>Net Current Assets</b>		57,927	67,975
<b>Total Net Assets</b>		<u><b>1,897,789</b></u>	<u><b>1,753,088</b></u>
<b>Represented by:</b>			
<b>Funds</b>			
Unrestricted		1,892,075	1,745,912
Restricted		5,714	7,176
		<u><b>1,897,789</b></u>	<u><b>1,753,088</b></u>

Approved by the Trustees on:

15 December 2025

Signed on their behalf

Rob Booth  
Treasurer



Persephone Booth

Persephone C Booth  
Chairman

**Framlingham Unitarian Trust**  
**Notes to the Financial Statements**  
**For the year ending 30th September 2025**

**1. ACCOUNTING POLICIES**

**Accounting convention**

The financial statements have been prepared under the historical cost convention, except that investment assets are carried at market value, in accordance with the Charities Act Statement of Recommended Practice - Accounting and Reporting by Charities (SORP 2005).

**Funds**

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor through the terms of the appeal.

**Incoming Resources**

All incoming resources are included in the statement of financial activities when the charity is entitled to the income and the amount can be quantified with reasonable accuracy.

The following specific policies are applied to particular categories of income.

Voluntary income received by way of grants, donations and gifts is included in full in the Statement of Financial Activities when receivable.

Investment income is included when receivable.

**Resources Expended**

Expenditure is recognised on an accrual basis as a liability is incurred, Expenditure includes and VAT which cannot be fully recovered, and is reported as part of the expenditure to which it relates.

**1. Fixed Assets**

	Unrestricted funds	Restricted funds	Total 2025	Unrestricted funds	Restricted funds	Total 2024
	£	£	£	£	£	£
<b>Freehold Property</b>						
Meeting House	165,000	-	165,000	165,000	-	165,000
Mill Yard Cottage (15 Bridge Street)	220,000	-	220,000	220,000	-	220,000
	<b>385,000</b>	<b>-</b>	<b>385,000</b>	<b>385,000</b>	<b>-</b>	<b>385,000</b>
<b>Fixtures and Fittings</b>						
Organ	120,000	-	120,000	11,000	-	11,000
Piano	981	-	981	981	-	981
Clock	220	-	220	220	-	220
Fire proof cabinet	1,180	-	1,180	1,327	-	1,327
Interactive TV	1,829	-	1,829	2,438	-	2,438
	<b>124,210</b>	<b>-</b>	<b>124,210</b>	<b>15,967</b>	<b>-</b>	<b>15,967</b>
<b>Investments</b>						
J M Finn Investments	1,330,652	-	1,330,652	1,284,146	-	1,284,146
	<b>1,330,652</b>	<b>-</b>	<b>1,330,652</b>	<b>1,284,146</b>	<b>-</b>	<b>1,284,146</b>

Investments held as fixed assets are revalued at market value at the balance sheet date and the gain or loss taken to the Statement of Financial Activities. All investments are now held by J M Finn Investment Managers. The interactive TV is expected to have a useful life of 5 years and the filing cabinet of 10 years and from 2024 will be depreciated on a straight line basis. The organ was revalued at £120,000 in March 2025

	2025	2024
	£	£
Market value at 01 October 2024	1,284,146	1,163,166
Increase in value	46,506	120,980
Cash investments in year	-	-
Decrease in value	-	-
Value at 30 September 2025	<b>1,330,652</b>	<b>1,284,146</b>

Continued...

**Framlingham Unitarian Trust**  
**Notes to the Financial Statements**  
**For the year ending 30th September 2025**

2. Liabilities	2025	2024
	£	£
Amounts falling due in one year		
Accounting FUT	823	420
Accounting Min acc	247	130
Accruals FUT	852	94
Accruals Min acc	1,854	583
	<u>3,776</u>	<u>1,227</u>

**3. Congregation Monies**

Opening balance 01 October 2024	648	375
Add Collections & donations	431	485
Membership fees	396	370
Donation from MH Trustees	-	1,000
	<u>1,475</u>	<u>2,230</u>
Less Congregation expenses		
Admin costs	280	187
Sundry expenses	-	-
GA quota	385	350
General Assembly	-	-
Ministers service fees	112	185
Preaching fees	-	-
Organ playing	815	860
	<u>(1,592)</u>	<u>(1,582)</u>
Closing balance of Congregation funds at 30 September 2025	<u>(116)</u>	<u>648</u>

**4. Ministry Account**

The minister started work on 01 October 2014. The annual costs are to be paid 50% by Framlingham and 50% by Bury St Edmunds.

Opening balance of Ministry funds 01 October 2024	6,462	5,595
Add Fram contribution	32,000	22,000
BSE contribution	13,500	19,000
BSE contribution to rent	2,500	3,000
Less Ministry expenses for year	(41,132)	(37,133)
Rent	(7,500)	(6,000)
Closing balance of fund at 30 September 2025	<u>5,830</u>	<u>6,462</u>

**5. Special Collection**

Balance brought forward	66	20
Income Café Connect	1,747	1,246
Paid out	(1,813)	(1,200)
Balance	<u>-</u>	<u>66</u>

<b>Total restricted funds</b>	<u><u>5,714</u></u>	<u><u>7,176</u></u>
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**FRAMLINGHAM UNITARIAN TRUST**  
**Independent Examiner's Report to the Trustees of**  
**Framlingham Unitarian Trust**

I report on the accounts of the Charity for the year ended 30<sup>th</sup> September 2025 which are set out on pages 1 to 5.

**Respective responsibilities of the trustees and examiner**

As the charity's trustees, you are responsible for the preparation of accounts. The charity's trustees consider that an audit is not required for this year under section 43 (2) of the Charities Act 1993 (the 1993 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 43 of the 1993 Act;
- to follow the procedure laid down in the general Directions given by the Charity Commission under section 43(7)(b) of the 1993 Act; and
- to state whether particular matters have come to my attention.

**Basis of Independent Examiner's Report**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

**Independent Examiner's Statement**

In connection with my examination, no matter has come to my attention

1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with Section 41 of the 1993 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 1993 Act
- have not been met; or

2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Miss Rachel Parker  
2 Park Corner  
Tuddenham St Martin  
Nr Ipswich  
Suffolk IP6 9DE



Dated: 21/01/2026

The Trustees of the Unitarian Meeting House

Framlingham, Suffolk

Annual Report for the year ended 30<sup>th</sup> September 2025

The Trustees submit their Annual Report on the affairs of the charity together with the financial statement for the year ended 30<sup>th</sup> September 2025.

**Principal Activity**

The principal activity of the Trust in the year under review was the discharge of the duties of Trustees of the trusts for which they are responsible.

**The Trustees**

The Managing Trustees shall consist, when complete, of a body of eight persons of the Unitarian persuasion.

**Trustees serving during the year were as follows:**

Mrs Persephone Booth  
The Timbers  
Church Road  
Kettleborough  
Suffolk, IP13 7LE  
Appointed October 2013

Mr John McEwan  
22 Double Street  
Framlingham  
Suffolk  
IP13 9BN  
Appointed September 2007

Mr Martin Croucher  
Trinity Cottage  
Bridge Street  
Rendham  
Suffolk, IP17 2AZ  
Appointed October 2013

Mr Robert Eric Booth  
The Timbers  
Church Road  
Kettleborough  
Suffolk, IP13 7LE  
Appointed May 2023

**Custodial Trustee**

British and Foreign Unitarian Association Inc  
Essex Hall  
1-6 Essex Street  
London  
WC2R 3HY  
Charity Number 255205

**Professional Advisors****Bank**

Barclays Bank

**Accountant**

Robina Wilkes FIAB

RWAS

62 Quilter Road

Felixstowe

Suffolk

IP11 7JL

**Solicitors**

Jackamans Solicitors

Park House

Mere Street

Diss

IP22 4JY

**Financial Advisors**

Kevin Froggatt DipPFS

Lucas Fettes Financial Planning

3-4 Willow Form Allwood Green

Rickinghall

Diss

Norfolk

IP22 1LQ

## **Framlingham Unitarian Trust Chairman's Report 2024/25 to 30 Sept 2025**

We have managed this year with four trustees, because Bruce Chilton resigned in September 2024. As long as we have four Trustees at a meeting, we form a quorum. The Trustees held four meetings and the AGM during the year.

The investments are supervised by the Treasurer – with input from the Finance Committee – and our Independent Financial Adviser, Kevin Froggatt of Lucas Fettes (now part of Brooks MacDonald). Our investments managers are J M Finn.

Our accountant Robina Robinson takes care of the monthly bookkeeping, the payroll, and the end of year Financial Statements. She attended the Trustees meetings when she was available, and provided useful input. Our Secretary Carly Holland has taken on a new role in her other job, so she is unable to attend the Trustees' meetings on Monday mornings. She is no longer able to take the Minutes, so Minute taking has been shared between the Chairman, and Accountant. We need to find a new person to take the Minutes.

The accounts show a loss for the year for the third year running, mainly due this year to an increase in the Framlingham contribution to the Ministry Management Committee, from half to two-thirds, agreed for this year only. However, the investments show an increase in valuation

The Meeting House provides two in-person congregational services per month, and there are also two zoom meetings. There is a Café Connect social event every Tuesday morning, which draws people to the Meeting House, and also Meet Up Thursdays. The MH is registered to conduct weddings and same-sex marriages, and is also used for funerals and celebrations of life.

The Meeting House is regularly used by diverse hirers.

### **Admin and governance during the year:**

The unregistered strip of land behind the Meeting House has now been registered at HM Land Registry by Jackamans, solicitors.

The Safeguarding policy has been updated. There is a Sexual Harrassment policy, and all employees and the chairman have undertaken a Sexual Harrassment training course, according to current legal requirements. The Chairman has also attended a Safeguarding for Trustees online course.

We are in the process of reviewing the legally required policies, taking note of those we already have and identifying any we still need.

There have been general discussions about CIO and governance, the advantages and disadvantages of a CIO. This has been looked into in more depth, and a meeting was set up with Simon Bland. Our Trustee, John McEwan, feels strongly that we should become a CIO to future proof our charity. We felt we needed some new Trustees to help with the process of becoming a CIO.

A member of the Congregation is attending each of the Trustee meetings, which gives them an idea of how the Trustees proceed.

### **Repairs and maintenance:**

A new wooden fence has been installed along the boundary with Lynsmere at the back of the property. We took professional advice from G C Robertson regarding the ancient flint wall at the rear of the property. A topographic survey was done and Robertson prepared plans for demolishing and rebuilding the flint wall. We then applied for Pre-planning advice regarding the wall. The MH is Grade II \* listed, and we are in a conservation area, so any changes need planning permission.

Two people from the Council Planning Department came to do a site visit. We were advised we would need Listed Building Consent, and that Historic England needs to have an opinion. It is possible there may be alternative preferable ways to support the wall.

The brick front wall bordering the library car park has been repointed.

The Quinquennial Report has been done by Tim Buxbaum, the architect who designed and supervised the refurbishment of the Meeting House.

We have also had a Fire Risk Assessment undertaken, and outstanding actions have been progressed.

There has been an ongoing problem with damp getting into one of the electric sockets, and measures have been taken to reduce the ingress of damp. It is a three hundred year old building with no damp proof course.

#### **Ministry Management Committee:**

Our Minister has previously been shared 50:50 with Bury St Edmunds Unitarians, and each Meeting House was paying half the cost of the Minister. Bury had indicated that they cannot continue to pay their full half share. Framlingham agreed that for 2024/25 only, we would pay 2/3 share of the total cost of the Minister. This has put pressure on the Framlingham Trustees' finances, and it was necessary to dip into the Savings Deposit account.

We feel it is not sustainable in the long term. Bury St Edmunds were pointed in the direction of a Sustentation Fund from the GA, which might have provided some financial assistance, but they did not take it up.

Now we have had a chance to settle down after the Trustee difficulties in 22-23, we need to look for some new Trustees, especially some younger ones who will be able to carry on in future. We are pursuing the possibility of some new Trustees.

Persephone C Booth, Mrs., Chairman of the Trustees

9.2.26

**UNITARIAN CHAPEL TRUST PROPERTY**

England & Wales - Charity number 262249

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# Accounts

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**Framlingham Unitarian Trust**

**Unitarian Chapel Trust Property  
Known as "Framlingham Unitarian Trust"  
Charity No. 262249**

**Accounts for the year ending 30th September 2024**

## Framlingham Unitarian Trust Contents

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	<b>Page</b>
Trust Information	1
Statement of Financial Activities	2
Balance Sheet	3
Notes to the Financial Statements	4-5
Independent Examiner's Report	6

## Framlingham Unitarian Trust Trust Information

---

**TREASURER:** Mr Rob Booth  
The Timbers  
Church Road  
Kettleburgh  
Nr Woodbridge  
Suffolk  
IP13 7LE

**SECRETARY & CONTACT:** Mrs Carly Holland  
4 Smiths Close  
Worlingworth  
Nr Woodbridge  
Suffolk  
IP13 7JG

**CHARITY NUMBER:** 262249

**ACCOUNTANTS:** Robina Wilkes FIAB  
RWAS  
62 Quilter Road  
Felixstowe  
Suffolk  
IP11 7JL

**Framlingham Unitarian Trust**  
**Statement of Financial Activities**  
**For the year ending 30th September 2024**

	Notes	2024			2023		
		Unrestricted £	Restricted £	Totals £	Unrestricted £	Restricted £	Totals £
<b>Incoming Resources</b>							
Income from investments							
Finn investment dividends		36,965	-	36,965	37,926	-	37,926
COIF interest		2,126	-	2,126	1,525	-	1,525
Hire		3,166	-	3,166	3,783	-	3,783
Donations / Grants / Fees		170	-	170	1,305	-	1,305
Congregation monies	3	(1,000)	1,855	855	(1,000)	1,551	551
Special collections / Café Connect		-	1,246	1,246	-	1,061	1,061
Sale of furniture		-	-	-	500	-	500
Bury St Edmunds contribution		-	22,000	22,000	-	20,500	20,500
Rent - 15 Bridge Street (From Bury)		3,000	(3,000)	-	3,000	(3,000)	-
<b>Total Incoming Resources</b>		<b>44,427</b>	<b>22,101</b>	<b>66,528</b>	<b>47,039</b>	<b>20,112</b>	<b>67,151</b>
<b>Resources Expended</b>							
Insurance		1,759	-	1,759	1,570	-	1,570
Wages		7,680	-	7,680	7,767	-	7,767
Repairs and maintenance		10,721	-	10,721	3,583	-	3,583
Organ and piano repairs		247	-	247	80	-	80
Accounting		1,357	-	1,357	3,230	-	3,230
Professional fees		1,291	-	1,291	15,273	-	15,273
Marketing		24	-	24	24	-	24
Travel expenses		47	-	47	262	-	262
Utilities		2,926	-	2,926	1,971	-	1,971
Miscellaneous expenses		1,335	-	1,335	3,817	-	3,817
Ministry expenses	4	-	37,133	37,133	-	36,665	36,665
Rental property expenses		364	-	364	466	-	466
Charitable donations / Café Connect / Warm Spaces		250	1,200	1,450	802	1,108	1,910
Congregation expenses	3	-	1,582	1,582	-	1,746	1,746
<b>Total Resources Expended</b>		<b>28,000</b>	<b>39,915</b>	<b>67,915</b>	<b>38,845</b>	<b>39,519</b>	<b>78,364</b>
<b>Net Incoming Resources</b>		<b>16,427</b>	<b>(17,814)</b>	<b>(1,387)</b>	<b>8,194</b>	<b>(19,407)</b>	<b>(11,212)</b>
Gains / (Loss) on investments		120,980	-	120,980	57,429	-	57,429
Depreciation on assets		(757)	-	(757)	-	-	-
Change in valuation of 15 Bridge Street		-	-	-	20,000	-	20,000
Change in valuation of Meeting House		-	-	-	115,000	-	115,000
<b>Net Movement in Funds</b>		<b>136,650</b>	<b>(17,814)</b>	<b>118,836</b>	<b>200,623</b>	<b>(19,407)</b>	<b>181,217</b>
Balances brought forward 01 October 2023		1,628,262	5,990	1,634,253	1,445,139	7,897	1,453,036
Transfer Trustees ac / Min ac		(19,000)	19,000	-	(17,500)	17,500	-
30 September 2024 C/f		<b>1,745,912</b>	<b>7,176</b>	<b>1,753,088</b>	<b>1,628,262</b>	<b>5,990</b>	<b>1,634,253</b>
General fund		1,745,912	-	1,745,913	1,628,262	-	1,628,262
Congregation funds	3	-	648	648	-	375	375
Ministry funds	4	-	6,462	6,462	-	5,595	5,595
Special collection	5	-	66	66	-	20	20
Balances carried forward 30 September 2024 C/f		<b>1,745,912</b>	<b>7,176</b>	<b>1,753,088</b>	<b>1,628,262</b>	<b>5,990</b>	<b>1,634,253</b>

**Framlingham Unitarian Trust**  
**Balance Sheet**  
**As at 30th September 2024**

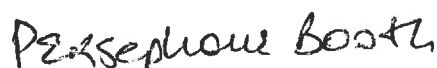
	Notes	2024 £	2023 £
<b>Fixed Assets</b>	1		
Freehold property		385,000	385,000
Fixtures & fittings		15,967	13,677
Investments		1,284,146	1,163,166
		<u>1,685,113</u>	<u>1,561,843</u>
<b>Current Assets</b>			
Debtors / (Prepayments)		586	(6,425)
CBF deposits		42,737	40,786
Barclays Current account		15,587	26,079
Petty cash account		117	258
Barclays Ministry account		10,175	12,288
		<u>69,202</u>	<u>72,986</u>
<b>Current Liabilities</b>			
Creditors / Accruals	2	<u>(1,227)</u>	<u>(576)</u>
<b>Net Current Assets</b>		67,975	72,410
<b>Total Net Assets</b>		<u><u>1,753,088</u></u>	<u><u>1,634,253</u></u>
<b>Represented by:</b>			
<b>Funds</b>			
Unrestricted		1,745,912	1,628,262
Restricted		7,176	5,990
		<u><u>1,753,088</u></u>	<u><u>1,634,253</u></u>

Approved by the Trustees on:

Signed on their behalf



Rob Booth  
Treasurer



Persephone C Booth  
Chairman

**Framlingham Unitarian Trust**  
**Notes to the Financial Statements**  
**For the year ending 30th September 2024**

**1. ACCOUNTING POLICIES**

**Accounting convention**

The financial statements have been prepared under the historical cost convention, except that investment assets are carried at market value, in accordance with the Charities Act Statement of Recommended Practice - Accounting and Reporting by Charities (SORP 2005).

**Funds**

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor through the terms of the appeal.

**Incoming Resources**

All incoming resources are included in the statement of financial activities when the charity is entitled to the income and the amount can be quantified with reasonable accuracy.

The following specific policies are applied to particular categories of income.

Voluntary income received by way of grants, donations and gifts is included in full in the Statement of Financial Activities when receivable.

Investment income is included when receivable.

**Resources Expended**

Expenditure is recognised on an accrual basis as a liability is incurred, Expenditure includes and VAT which cannot be fully recovered, and is reported as part of the expenditure to which it relates.

**1. Fixed Assets**

	Unrestricted funds	Restricted funds	Total 2024	Unrestricted funds	Restricted funds	Total 2023
	£	£	£	£	£	£
<b>Freehold Property</b>						
Meeting House	165,000	-	165,000	165,000	-	165,000
Mill Yard Cottage (15 Bridge Street)	220,000	-	220,000	220,000	-	220,000
	<b>385,000</b>	<b>-</b>	<b>385,000</b>	<b>385,000</b>	<b>-</b>	<b>385,000</b>
<b>Fixtures and Fittings</b>						
Organ	11,000.0	-	11,000	11,000	-	11,000
Piano	981.0	-	981	981	-	981
Clock	220.0	-	220	220	-	220
Fire proof cabinet	1,327	-	1,327	1,476	-	1,476
Interactive TV	2,438	-	2,438	-	-	-
	<b>15,967</b>	<b>-</b>	<b>15,967</b>	<b>13,677</b>	<b>-</b>	<b>13,677</b>
<b>Investments</b>						
J M Finn Investments	1,284,146	-	1,284,146	1,163,166	-	1,163,166
	<b>1,284,146</b>	<b>-</b>	<b>1,284,146</b>	<b>1,163,166</b>	<b>-</b>	<b>1,163,166</b>

Investments held as fixed assets are revalued at market value at the balance sheet date and the gain or loss taken to the Statement of Financial Activities. All investments are now held by J M Finn Investment Managers. The interactive TV is expected to have a useful life of 5 years and the filing cabinet of 10 years and from 2023 will be depreciated on a straight line basis.

	2024	2023
	£	£
Market value at 01 October 2023	1,163,166	1,105,737
Increase in value	120,980	57,429
Cash investments in year	-	-
Decrease in value	-	-
Value at 30 September 2024	<b>1,284,146</b>	<b>1,163,166</b>

**Framlingham Unitarian Trust**  
**Notes to the Financial Statements**  
**For the year ending 30th September 2024**

<b>2. Liabilities</b>	2024	2023
	£	£
Amounts falling due in one year		
Accounting FUT	420	45
Accounting Min acc	130	23
Accruals FUT	94	338
Accruals Min acc	583	170
	<u>1,227</u>	<u>576</u>

**3. Congregation Monies**

Opening balance 01 October 2023	375	570
Add Collections & donations	485	443
Membership fees	370	108
Donation from MH Trustees	1,000	1,000
	<u>2,230</u>	<u>2,121</u>
Less Congregation expenses		
Admin costs	187	202
Sundry expenses	-	-
GA quota	350	350
General Assembly	-	350
Ministers service fees	185	114
Preaching fees	-	-
Organ playing	860	730
	<u>(1,582)</u>	<u>(1,746)</u>
Closing balance of Congregation funds at 30 September 2024	<u>648</u>	<u>375</u>

**4. Ministry Account**

The minister started work on 01 October 2014. The annual costs are to be paid 50% by Framlingham and 50% by Bury St Edmunds.

Opening balance of Ministry funds 01 October 2023	5,595	7,260
Add Fram contribution	22,000	20,500
BSE contribution	19,000	17,500
BSE contribution to rent	3,000	3,000
Less Ministry expenses for year	(37,133)	(36,665)
Rent	(6,000)	(6,000)
Closing balance of fund at 30 September 2024	<u>6,462</u>	<u>5,595</u>

**5. Special Collection**

Balance brought forward	20	67
Income Café Connect	1,246	1,061
Paid out	(1,200)	(1,108)
Balance	<u>66</u>	<u>20</u>
<b>Total restricted funds</b>	<u>7,176</u>	<u>5,990</u>

**FRAMLINGHAM UNITARIAN TRUST**  
**Independent Examiner's Report to the Trustees of**  
**Framlingham Unitarian Trust**

I report on the accounts of the Charity for the year ended 30<sup>th</sup> September 2024 which are set out on pages 1 to 5.

**Respective responsibilities of the trustees and examiner**

As the charity's trustees, you are responsible for the preparation of accounts. The charity's trustees consider that an audit is not required for this year under section 43 (2) of the Charities Act 1993 (the 1993 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 43 of the 1993 Act;
- to follow the procedure laid down in the general Directions given by the Charity Commission under section 43(7)(b) of the 1993 Act; and
- to state whether particular matters have come to my attention.

**Basis of Independent Examiner's Report**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

**Independent Examiner's Statement**

In connection with my examination, no matter has come to my attention

1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with Section 41 of the 1993 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 1993 Act
- have not been met; or

2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Miss Rachel Parker  
2 Park Corner  
Tuddenham St Martin  
Nr Ipswich  
Suffolk IP6 9DE



Dated: 3/3/2025

**The Trustees of the Unitarian Meeting House  
Framlingham, Suffolk**

**Annual Report for the year ended 30 September 2024**

The Trustees submit their Annual Report on the affairs of the charity together with the financial statement for the year ended 30 September 2024.

**Principal Activity**

The principal activity of the Trust in the year under review was the discharge of the duties of Trustees of the trusts for which they are responsible.

**The Trustees**

The Managing Trustees shall consist, when complete, of a body of eight persons of the Unitarian persuasion.

**Trustees serving during the year were as follows:**

Mrs Persephone Booth  
The Timbers  
Church Road  
Kettleburgh  
Suffolk  
IP13 7LE  
Appointed October 2013

Mr Bruce Chilton  
22 Marston Lane  
Norwich  
Norfolk  
NR4 6LZ  
Appointed 15 June 2003 (Stood down September 2024)

Mr John McEwan  
22 Double Street  
Framlingham  
IP13 9BN  
Appointed September 2007

Mr Robert Eric Booth  
The Timbers  
Church Road  
Kettleburgh  
Suffolk  
IP13 7LE  
Appointed May 2023

Mr Martin Croucher  
Trinity Cottage  
Bridge Street  
Rendham  
Suffolk  
IP17 2AZ  
Appointed October 2013

**Custodial Trustee**

British and Foreign Unitarian Association Inc  
Essex Hall  
1-6 Essex Street  
London  
WC2R 3HY

Charity Number 255205

**Professional Advisors****Bank**

Barclays Bank

**Accountant**

Robina Wilkes FIAB

RWAS

62 Quilter Road

Felixstowe

Suffolk

IP11 7JL

**Solicitors**

Jackamans Solicitors

Park House

Mere Street

DISS

IP22 4JY

**Financial Advisors**

Kevin Froggatt DipPFS

Lucas Fettes Financial Planning

3-4 Willow Form Allwood Green

Rickinghall

Diss

Norfolk

IP22 ILQ

## **Framlingham Unitarian Trust Chairman's Report 2023/24 to 30 Sept 2024**

We have managed this year with five trustees, but Bruce Chilton was very ill and has not been able to attend meetings until September. As long as we have four Trustees at a meeting, we form a quorum. The Trustees held three meetings and the AGM during the year. In September 2024, Bruce Chilton stood down as a Trustee, after more than 20 years. We very much regret losing him for his experience and his knowledge and expertise, both Unitarian and legal.

The investments are supervised by the Treasurer – with input from the Finance Committee – and our Independent Financial Adviser, Kevin Froggatt of Lucas Fettes. Our investments managers are J M Finn.

Our accountant Robina Robinson takes care of the monthly bookkeeping, the payroll, and the end of year Financial Statements. She attended the Trustees meetings when she was available, and provided useful input.

The accounts show a small loss for the year, mainly due to an increase in the Repairs and Maintenance of the building. However, the investments show significant increase in valuation, double the previous year.

The Meeting House provides one in-person congregational service per month, and there are also two zoom meetings. There is a Café Connect social event every Tuesday morning, which draws people to the Meeting House, and also Meet Up Thursdays (which started out as Warm Thursdays in the winter of 22-23.) The MH is registered to conduct weddings and same-sex marriages, and is also used for funerals and celebrations of life.

### **Admin and governance during the year:**

Our governing documents have been submitted to the Charity Commission, updated to the 2016 Constitution.

Our Finance Policy and Terms of Reference have been reviewed and updated.

The unregistered strip of land behind the Meeting House is now being registered at HM Land Registry by Jackamans, solicitors.

The Safeguarding policy has been updated.

There have been general discussions about CIO and governance, the advantages and disadvantages of a CIO. This will be looked into in more depth, and a meeting will be set up with Simon Bland.

A member of the congregation is attending the Trustee meetings.

### **Repairs and maintenance:**

The Meeting House has had some repairs and redecorating by a tradesman who specialises in ancient and listed buildings. The final window has had a new specially handmade wooden mullion, and has been installed by the glazier from Ipswich.

We have received planning permission (with help from Hollins the architects) to erect a fence along the boundary with Lynsmere at the back of the property. This should be installed in the next month or so. We are also in the process of taking professional advice from G C Robertson regarding the ancient flint wall at the rear of the property.

The brick front wall bordering the library car park is in need of repointing, and quotes are being obtained.

An interactive TV screen has been purchased and is in use by the Minister for services, and by hirers. Three new trees have been planted to the rear of the Meeting House, an English Oak, a Rowen, and a flowering cherry. They have been carefully situated to benefit the landscape.

**Ministry Management Committee:**

Our Minister has been shared 50:50 with Bury St Edmunds Unitarians, and each Meeting House pays half the cost of the Minister. Bury St Edmunds have revealed that the value of their investments is less than half of Framlingham's investments, and Bury have indicated that they cannot continue to pay their full half share. From 2024 onwards, they would be able to afford to pay 1/3 share of the total cost of the Minister. This could put pressure on the Framlingham Trustees' finances.

Framlingham agreed to pay 2/3 for 24/25, but feel it is not sustainable in the long term. Bury St Edmunds have been pointed in the direction of a Sustentation Fund from the GA, which might provide some financial assistance.

Now we have had a chance to settle down after the Trustee difficulties in 22-23, we need to look for some new Trustees, especially some younger ones who will be able to carry on in future.

Persephone C Booth, Mrs., Chairman of the Trustees

23.3.25

**UNITARIAN CHAPEL TRUST PROPERTY**

England & Wales - Charity number 262249

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# Accounts

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Framlingham Unitarian Trust

Unitarian Chapel Trust Property  
Known as "Framlingham Unitarian Trust"  
Charity No. 262249

Accounts for the year ending  
30th September 2023

# Framlingham Unitarian Trust

## Contents

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	Page
Trust Information	3
Statement of Financial Activities	4
Balance Sheet	5
Notes to the Financial Statements 4	6-7
Independent Examiner's Report	8

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Framlingham Unitarian Trust

Trust Information

TREASURER:

Robert Eric Booth  
The Timbers  
Church Road  
Kettleburgh  
Nr Woodbridge  
Suffolk  
IP13 7LE

SECRETARY & CONTACT:

Mrs Carly Holland  
4 Smiths Close  
Worlingworth  
Nr Woodbridge  
Suffolk  
IP13 7JG

CHARITY NUMBER:

262249

ACCOUNTANTS:

Robina Wilkes FIAB  
RWAS  
62 Quilter Road  
Felixstowe  
Suffolk  
IP11 7JL  
Unitarian Trust

Framlingham Unitarian Trust  
Statement of Financial Activities  
For the year ending 30th September 2023

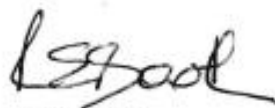
	Notes	2023			2022		
		Unrestricted £	Restricted £	Totals £	Unrestricted £	Restricted £	Totals £
<b>Incoming Resources</b>							
Income from investments							
Finn investment dividends		37,926	0	37,926	38,598	0	38,598
COIF interest		1,525	0	1,525	231	0	231
Hire		3,783	0	3,783	3,418	0	3,418
Donations / Grants / Fees		1,305	0	1,305	39	0	39
Congregation monies	3	(1,000)	1,551	551	(1,000)	1,748	748
Special collections / Café Connect		0	1,061	1,061	0	1,452	1,452
Sale of furniture		500	0	500	0	0	0
Bury St Edmunds contribution		0	20,500	20,500	0	20,500	20,500
Rent - 15 Bridge Street (From Bury)		3,000	(3,000)	0	3,000	(3,000)	0
<b>Total Incoming Resources</b>		<b>47,039</b>	<b>20,112</b>	<b>67,151</b>	<b>44,286</b>	<b>20,700</b>	<b>64,986</b>
<b>Resources Expended</b>							
Insurance		1,570	0	1,570	1,432	0	1,432
Wages		7,767	0	7,767	5,724	0	5,724
Repairs and maintenance		3,583	0	3,583	4,479	0	4,479
Organ and piano repairs		80	0	80	269	0	269
Accounting		3,230	0	3,230	2,362	0	2,362
Professional fees		15,273	0	15,273	1,119	0	1,119
Marketing		24	0	24	0	0	0
Travel expenses		262	0	262	0	0	0
Utilities		1,971	0	1,971	1,888	0	1,888
Miscellaneous expenses		3,817	0	3,817	1,471	0	1,471
Ministry expenses	4	0	36,665	36,665	0	34,623	34,623
Rental property expenses		466	0	466	1,372	0	1,372
Charitable donations / Café Connect / Warm Spaces		802	1,108	1,910	0	1,385	1,385
Congregation expenses	3	0	1,746	1,746	0	2,644	2,644
<b>Total Resources Expended</b>		<b>38,845</b>	<b>39,519</b>	<b>78,364</b>	<b>20,116</b>	<b>38,652</b>	<b>58,768</b>
<b>Net Incoming Resources</b>							
		<b>8,194</b>	<b>(19,407)</b>	<b>(11,212)</b>	<b>24,170</b>	<b>(17,952)</b>	<b>6,218</b>
Grains / (Loss) on investments		57,429	0	57,429	(134,122)	0	(134,122)
Change in valuation of 15 Bridge Street		20,000	0	20,000	0	0	0
Change in valuation of Meeting House		115,000	0	115,000	0	0	0
<b>Net Movement in Funds</b>							
		<b>200,623</b>	<b>(19,407)</b>	<b>181,217</b>	<b>(109,952)</b>	<b>(17,952)</b>	<b>(127,904)</b>
Balances brought forward 01 October 2022		1,445,139	7,897	1,453,036	1,573,091	7,849	1,580,940
Transfer Trustees ac / Min ac		(17,500)	17,500		(18,000)	18,000	0
30 September 2023 C/f		<b>1,628,262</b>	<b>5,990</b>	<b>1,634,253</b>	<b>1,445,139</b>	<b>7,897</b>	<b>1,453,036</b>
General fund		1,628,262		1,628,262	1,445,139	0	1,445,139
Congregation funds	3		375	375	0	570	570
Ministry funds	4		5,595	5,595	0	7,260	7,260
Special collection	5		20	20	0	67	67
Balances carried forward 30 September 2023 C/f		<b>1,628,262</b>	<b>5,990</b>	<b>1,634,253</b>	<b>1,445,139</b>	<b>7,897</b>	<b>1,453,036</b>

**Framlingham Unitarian Trust**  
**Balance Sheet**  
**As at 30th September 2023**

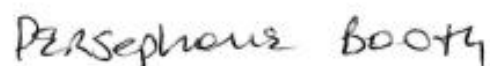
	Notes	2023 £	2022 £
<b>Fixed Assets</b>	1		
Freehold property		385,000	250,000
Fixtures & fittings		13,677	12,201
Investments		1,163,166	1,105,737
		<u>1,561,843</u>	<u>1,367,938</u>
<b>Current Assets</b>			
Debtors / (Prepayments)		(6,425)	(6,476)
CBF deposits		40,786	39,262
Barclays Current account		26,079	41,162
Petty cash account		258	0
Barclays Ministry account		12,288	14,325
		<u>72,986</u>	<u>88,273</u>
<b>Current Liabilities</b>			
Creditors	2	(576)	(3,175)
<b>Net Current Assets</b>		72,410	85,098
<b>Total Net Assets</b>		<u><b>1,634,253</b></u>	<u><b>1,453,036</b></u>
<b>Represented by:</b>			
<b>Funds</b>			
Unrestricted		1,628,262	1,445,639
Restricted		5,990	7,397
		<u><b>1,634,253</b></u>	<u><b>1,453,036</b></u>

Approved by the Trustees on:

Signed on their behalf



Rob Booth  
Treasurer



Persephone C Booth  
Chairman

**Framlingham Unitarian Trust**  
**Notes to the Financial Statements**  
**For the year ending 30th September 2023**

**1. ACCOUNTING POLICIES**

**Accounting convention**

The financial statements have been prepared under the historical cost convention, except that investment assets are carried at market value, in accordance with the Charities Act Statement of Recommended Practice - Accounting and Reporting by Charities (SORP 2005).

**Funds**

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor through the terms of the appeal.

**Incoming Resources**

All incoming resources are included in the statement of financial activities when the charity is entitled to the income and the amount can be quantified with reasonable accuracy.

The following specific policies are applied to particular categories of income.

Voluntary income received by way of grants, donations and gifts is included in full in the Statement of Financial Activities when receivable.

Investment income is included when receivable.

**Resources Expended**

Expenditure is recognised on an accrual basis as a liability is incurred, Expenditure includes and VAT which cannot be fully recovered, and is reported as part of the expenditure to which it relates.

**1. Fixed Assets**

	Unrestricted funds	Restricted funds	Total 2023	Unrestricted funds	Restricted funds	Total 2022
	£	£	£	£	£	£
<b>Freehold Property</b>						
Meeting House	165,000	0	165,000	50,000	0	50,000
Mill Yard Cottage (15 Bridge Street)	220,000	0	220,000	200,000	0	200,000
	<b>385,000</b>	<b>0</b>	<b>385,000</b>	<b>250,000</b>	<b>0</b>	<b>250,000</b>
<b>Fixtures and Fittings</b>						
Organ	11,000	0	11,000	11,000	0	11,000
Piano	981	0	981	981	0	981
Clock	220	0	220	220	0	220
Fire proof cabinet	1,476	0	1,476	0	0	0
	<b>13,677</b>	<b>0</b>	<b>13,677</b>	<b>12,201</b>	<b>0</b>	<b>12,201</b>
<b>Investments</b>						
J M Finn Investments	1,163,166	0	1,163,166	1,105,737	0	1,105,737
	<b>1,163,166</b>	<b>0</b>	<b>1,163,166</b>	<b>1,105,737</b>	<b>0</b>	<b>1,105,737</b>

Investments held as fixed assets are revalued at market value at the balance sheet date and the gain or loss taken to the Statement of Financial Activities. All investments are now held by J M Finn Investment Managers.

	2023	2022
	£	£
Market value at 01 October 2022	1,105,737	1,239,858
Increase in value	57,429	0
Cash investments in year	0	0
Decrease in value	0	(134,121)
Value at 30 September 2023	<b>1,163,166</b>	<b>1,105,737</b>

Continued...

**Framlingham Unitarian Trust**  
**Notes to the Financial Statements**  
**For the year ending 30th September 2023**

<b>2. Liabilities</b>	2023	2022
	£	£
Amounts falling due in one year		
Accounting FUT	45	812
Accounting Min acc	23	238
Accruals FUT	338	1,798
Accruals Min acc	170	327
	<u>576</u>	<u>3,175</u>

**3. Congregation Monies**

Opening balance 01 October 2022	570	1,466
Add Collections & donations	443	391
Membership fees	108	357
Donation from MH Trustees	1,000	1,000
	<u>2,121</u>	<u>3,214</u>
Less Congregation expenses		
Admin costs	202	544
Sundry expenses	0	0
GA quota	350	350
General Assembly	350	0
Ministers service fees	114	50
Preaching fees	0	0
Organ playing	730	1,700
	<u>(1,746)</u>	<u>(2,644)</u>
Closing balance of Congregation funds at 30 September 2023	<u>375</u>	<u>570</u>

**4. Ministry Account**

The minister started work on 01 October 2014. The annual costs are to be paid 50% by Framlingham and 50% by Bury St Edmunds.

Opening balance of Ministry funds 01 October 2022	7,260	6,383
Add Fram contribution	20,500	21,000
BSE contribution	17,500	17,500
BSE contribution to rent	3,000	3,000
Less Ministry expenses for year	(36,665)	(34,623)
Rent	(6,000)	(6,000)
Closing balance of fund at 30 September 2023	<u>5,595</u>	<u>7,260</u>

The fund balance as shown above differs from the bank balance due to timing issues of transfers between Min ac and Trustees ac. The figures for 2022 have been amended in 2023, to correct an error of Fram Contribution to the Ministry account.

**5. Special Collection**

Balance brought forward	67	0
Income Café Connect	1,061	852
Income - Ukraine fund raiser	0	600
Paid out	(1,108)	(1,385)
Balance	<u>20</u>	<u>67</u>
<b>Total restricted funds</b>	<u>5,990</u>	<u>7,897</u>

**FRAMLINGHAM UNITARIAN TRUST**  
**Independent Examiner's Report to the Trustees of**  
**Framlingham Unitarian Trust**

I report on the accounts of the Charity for the year ended 30<sup>th</sup> September 2023 which are set out on pages 1 to 5.

**Respective responsibilities of the trustees and examiner**

As the charity's trustees, you are responsible for the preparation of accounts. The charity's trustees consider that an audit is not required for this year under section 43 (2) of the Charities Act 1993 (the 1993 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 43 of the 1993 Act;
- to follow the procedure laid down in the general Directions given by the Charity Commission under section 43(7)(b) of the 1993 Act; and
- to state whether particular matters have come to my attention.

**Basis of Independent Examiner's Report**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

**Independent Examiner's Statement**

In connection with my examination, no matter has come to my attention

1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with Section 41 of the 1993 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 1993 Act
- have not been met; or

2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Miss Rachel Parker  
2 Park Corner  
Tuddenham St Martin  
Nr Ipswich  
Suffolk IP6 9DE



Dated: 7/03/2024

**The Trustees of the Unitarian Meeting House  
Framlingham, Suffolk**

**Annual Report for the year ended 30 September 2023**

The Trustees submit their Annual Report on the affairs of the charity together with the financial statement for the year ended 30 September 2023.

**Principal Activity**

The principal activity of the Trust in the year under review was the discharge of the duties of Trustees of the trusts for which they are responsible.

**The Trustees**

The Managing Trustees shall consist, when complete, of a body of eight persons of the Unitarian persuasion.

**Trustees serving during the year were as follows:**

Mrs Persephone Booth  
The Timbers  
Church Road  
Kettleburgh  
Suffolk  
IP13 7LE  
Appointed October 2013

Mr Bruce Chilton  
22 Marston Lane  
Norwich  
Norfolk  
NR4 6LZ  
Appointed 15 June 2003

Mr John McEwan  
22 Double Street  
Framlingham  
IP13 9BN  
Appointed September 2007

Mr Robert Eric Booth  
The Timbers  
Church Road  
Kettleburgh  
Suffolk  
IP13 7LE  
Appointed May 2023

Mr Martin Croucher  
Trinity Cottage  
Bridge Street  
Rendham  
Suffolk  
IP17 2AZ  
Appointed October 2013

**Custodial Trustee**

British and Foreign Unitarian Association Inc  
Essex Hall  
1-6 Essex Street  
London  
WC2R 3HY

Charity Number 255205

**Professional Advisors****Bank**

Barclays Bank

**Accountant**

Robina Wilkes FIAB

RWAS

62 Quilter Road

Felixstowe

Suffolk

IP11 7JL

**Solicitors**

Jackamans Solicitors

Park House

Mere Street

DISS

IP22 4JY

**Financial Advisors**

Kevin Froggatt DipPFS

Lucas Fettes Financial Planning

3-4 Willow Form Allwood Green

Rickinghall

Diss

Norfolk

IP22 ILQ

We started the year with significantly reduced numbers of Trustees, being 5 in all. Then Bruce Chilton was very ill and has not been able to attend any meetings. As long as we have four Trustees at a meeting, we form a quorum. The Trustees held three meetings and the AGM during the year.

The investments are supervised by the Treasurer – with input from the Finance Committee – and our Independent Financial Adviser, Kevin Froggatt of Lucas Fettes. Our investments managers are J M Finn.

We were pleased to welcome a new accountant, Robina Robinson, who takes care of the monthly bookkeeping, the payroll, and the end of year Financial Statements. She attended the Trustees meetings when she was available, and provided useful input.

The Meeting House provides one in-person congregational service per month, and there are also two zoom meetings. There is a Café Connect social event every Tuesday morning, which draws people to the Meeting House, and also Meet Up Thursdays (which started out as Warm Thursdays in the winter of 22-23.) The MH is registered to conduct weddings and same-sex marriages, and is also used for funerals and celebrations of life.

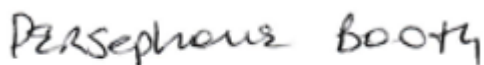
There was a safeguarding problem during the summer of 2023, which was dealt with by Matthew Smith, and the Chairman. This was a protracted and worrying problem, and took several months to sort out. The upshot was that a member of the Congregation was requested to stay away from the Meeting House for an indefinite period. The safeguarding was of an adult, not a child under 18. Rev Matthew Smith and I, the Chairman, are undertaking new safeguard training and have completed the Basic Awareness course, and the safeguarding policy has just been updated.

Rev Matthew Smith had a long holiday over the summer, having had no holidays in the previous three years since lockdown 2020. He had become exhausted emotionally and spiritually, and came back in September feeling more encouraged. We value him as our Minister and realise that we need to look after his well-being.

The Meeting House has had some repairs and redecorating by a tradesman who specialises in ancient and listed buildings. The broken windows with leaded panes have at last been repaired by a specialist glazier from Ipswich. One more window requires a new specially handmade wooden mullion.

We have received planning permission (with help from Hollins the architects) to erect a fence along the boundary with Lynsmere at the back of the property. We are also in the process of taking professional advice regarding the ancient flint wall at the rear of the property.

Now we have had a chance to settle down after the Trustee difficulties in 22-23, we need to look for some new Trustees, especially some younger ones who will be able to carry on in future.



Persephone C Booth  
Chairman

**UNITARIAN CHAPEL TRUST PROPERTY**

England & Wales - Charity number 262249

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# Accounts

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**The Trustees of the Unitarian Meeting House  
Framlingham, Suffolk**

**Annual Report for the year ended 30 September 2022**

The Trustees submit their Annual Report on the affairs of the charity together with the financial statement for the year ended 30 September 2022.

**Principal Activity**

The principal activity of the Trust in the year under review was the discharge of the duties of Trustees of the trusts for which they are responsible.

**The Trustees**

The Managing Trustees shall consist, when complete, of a body of eight persons of the Unitarian persuasion.

**Trustees serving during the year were as follows:**

Mr Bruce Chilton  
22 Marston Lane  
Norwich  
Norfolk  
NR4 6LZ  
Appointed 15 June 2003

Mr Ewout Van-Manen  
Flat 1, 2/4 High Street  
Saxmundham  
Suffolk  
IP17 1DD  
Appointed 30 March 2020

Eddie Thompson  
143 High Street  
Harrold  
Bedford  
MK43 7ED  
Resigned September 2022

Mr John McEwan  
22 Double Street  
Framlingham  
IP13 9BN  
Appointed September 2007

Mr David Owen  
5 Albert Place  
Framlingham  
IP13 9DX  
Appointed June 2011

Mr Martin Croucher  
Trinity Cottage  
Bridge Street  
Rendham  
Suffolk  
IP17 2AZ  
Appointed October 2013

Mrs Persephone Booth  
The Timbers  
Church Road  
Kettleburgh  
Suffolk  
IP13 7LE  
Appointed October 2013

Mrs Suzanne Jane Vyvyan Bartlett  
3 Victoria Mill Road  
Framlingham  
Woodbridge  
Suffolk  
Appointed 30<sup>th</sup> March 2020

Dr Chris Wright  
7 Lanyard Place  
Woodbridge  
Suffolk  
IP21 1FE  
Appointed March 2022

**Custodial Trustee**

British and Foreign Unitarian Association Inc  
Essex Hall  
1-6 Essex Street  
London  
WC2R 3HY

Charity Number 255205

## Professional Advisors

### Bank

Barclays Bank PLC  
Princess Street  
Ipswich  
Suffolk

### Accountant

Persephone Booth  
The Timbers  
Church Road  
Kettleburgh  
Suffolk  
IP13 7LE

### Solicitors

John Pulham  
Pulham & Co  
11 Market Place  
Saxmundham  
Suffolk

Liz Gifford  
Charles Russell Speechlys  
5 Fleet Place  
London  
EC4M 7RD

Resigned Nov 2022    Appointed Nov 2022

## Financial Advisors

Kevin Froggott DipPFS  
Lucos Feties Finonciol Plonning  
3-4 Willow Form Allwood Green  
Rickingholl  
Diss  
Norfolk  
IP22 ILQ

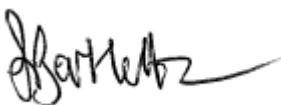
This has been a year of many changes, starting with the retirement of Angela Hatt, our long-standing Secretary and Trust Administrator. She has provided invaluable support to the Trust over the last 10 years and her commitment to the Trust during this time has been invaluable. It was decided after a three month trial to divide Angela's previous role into two. Carly Holland took over as Trust Administrator and Lizzie Kingston Harrison became Venue Manager, overseeing the lettings at the Meeting House. At the same time, Suzanne Bartlett was appointed Chair, replacing Bruce Chilton who had taken over from Martin Gienke when he retired in 2019. Christine Wright was co-opted as a trustee in March 2022 and Eddie Thomson retired as a trustee in September 2022.

Covid continued to have an impact on both services and lettings, resulting in a lack of income during this time. The combination of Zoom along with in-person services, once they resumed in February, suited community needs well at this transitional time, involving people from further afield in addition to our local community. New initiatives during the year included the launch of a monthly Tea and Readings gathering on the fourth Sunday of the month, where children have been welcome. The Inside Outside project, set up initially to make the Meeting House a more welcoming space, began with the introduction of indoor plants.

Having a dedicated venue manager has made a real difference to the Meeting House lettings. An online booking system has been introduced, making the process more efficient and professional, resulting in the venue being a sought after space for both Framlingham groups and those in the wider community. This has included providing the venue as a practice room for local musicians at minimal cost.

Café Connect was very much missed by the regular attendees during lockdown but once open again in early 2022 it continued to flourish on a weekly basis with the sterling aid of 6 volunteers and a dedicated baker. Making use of the gazebo in front of the Meeting House during the warmer months was a big draw. It was most welcoming to have everyone sitting outside and this encouraged people in, both locals and visitors to the town. £852 was raised for the Unitarian Charity *Send a Child to Hucklow* from Café Connect during the year. Several friendships have been made from the social interaction encouraged during these sessions.

Meeting House volunteers also arranged an outdoor concert in the spring with several local acts. This again attracted passing visitors as well as regulars to the Meeting House to enjoy the music and contribute towards the collection. This amounted to £600 which was sent to DEC for the Ukrainian Appeal.



**Signed**

**Date 16<sup>th</sup> January 2023**

**FRAMLINGHAM UNITARIAN TRUST**

**UNITARIAN CHAPEL TRUST PROPERTY  
KNOWN AS "FRAMLINGHAM UNITARIAN TRUST"**

**Charity No: 262249**

**Treasurer:**

Mrs Persephone C Booth, ATT(Fellow)  
The Timbers, Church Road  
Kettleburgh  
Nr Woodbridge  
Suffolk IP13 7LE

**Secretary & Contact:**

Mrs Carly Holland  
4 Smiths Close  
Worlingworth  
Nr Woodbridge  
Suffolk IP13 7JG

**Accounts for year ending 30th September 2022**

1. Independent Examiner's Report
2. Statement of Financial Activities
3. Balance Sheet
4. Notes to the accounts

*Prepared by Persephone C Booth, ATT(Fellow)*

*The Timbers, Church Road, Kettleburgh, Nr Woodbridge, Suffolk IP13 7LE*

*Tel: 01728-724421 email: persephone.booth@gmail.com*

**FRAMLINGHAM UNITARIAN TRUST**  
**Independent Examiner's Report to the Trustees of**  
**Framlingham Unitarian Trust**

I report on the accounts of the Charity for the year ended 30<sup>th</sup> September 2022 which are set out on pages 2 to 5.

**Respective responsibilities of the trustees and examiner**

As the charity's trustees, you are responsible for the preparation of accounts. The charity's trustees consider that an audit is not required for this year under section 43 (2) of the Charities Act 1993 (the 1993 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 43 of the 1993 Act;
- to follow the procedure laid down in the general Directions given by the Charity Commission under section 43(7)(b) of the 1993 Act; and
- to state whether particular matters have come to my attention.

**Basis of Independent Examiner's Report**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

**Independent Examiner's Statement**

In connection with my examination, no matter has come to my attention

1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with Section 41 of the 1993 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 1993 Act
- have not been met; or

2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Miss Rachel Parker  
2 Park Corner  
Tuddenham St Martin  
Nr Ipswich  
Suffolk IP6 9DE



Dated: 6/2/2023

FRAMLINGHAM UNITARIAN TRUST

STATEMENT OF FINANCIAL ACTIVITIES  
For the year ending 30th September 2022

	Notes	2022			2021		
		Unrestricted	Restricted	Totals	Unrestricted	Restricted	Totals
<b>INCOMING RESOURCES</b>							
Income from investments							
Finn investment dividends		38,598		38,598	32,253		32,253
COIF interest		231		231	5		5
Hire		3,418		3,418	995		995
Donations/Grants/Fees		39		39	315		315
Congregation monies	3	-1,000	1,748	748	-1,000	1,769	769
Special collection/Café Connect			1,452	1,452		212	212
Bury St Edmunds contribution		0	20,500	20,500	0	20,500	20,500
Rent - 15 Bridge St (from Bury)		3,000	(3,000)	0	3,000	(3,000)	0
<b>TOTAL INCOMING RESOURCES</b>		<b>44,286</b>	<b>20,700</b>	<b>64,986</b>	<b>35,568</b>	<b>19,481</b>	<b>55,049</b>
<b>RESOURCES EXPENDED</b>							
Insurance		1,432		1,432	1,392		1,392
Wages		5,724		5,724	4,136		4,136
Repairs and Maintenance		4,479		4,479	2,988		2,988
Organ & piano repairs		269		269	340		340
Accounting		2,362		2,362	1,858		1,858
Professional fees		1,119		1,119	0		0
Travel expenses		0		0	127		127
Utilities		1,888		1,888	1,863		1,863
Miscellaneous expenses		1,471		1,471	2,050		2,050
Ministry expenses	4		34,623	34,623		33,282	33,282
Rental Property expenses		1,372		1,372	3,803		3,803
Charitable dons/Café Connect		0	1,385	1,385	0	741	741
Congregation Expenses	3		2,644	2,644		999	999
<b>TOTAL RESOURCES EXPENDED</b>		<b>20,116</b>	<b>38,652</b>	<b>58,768</b>	<b>18,557</b>	<b>35,022</b>	<b>53,579</b>
<b>NET INCOMING RESOURCES</b>		<b>24,170</b>	<b>(17,952)</b>	<b>6,218</b>	<b>17,011</b>	<b>(15,541)</b>	<b>1,470</b>
Gains/(Loss) on investments		(134,122)	0	(134,122)	194,205	0	194,205
Change in valuation of 15 Bridge St		0		0	0		0
<b>NET MOVEMENT IN FUNDS</b>		<b>(109,952)</b>	<b>(17,952)</b>	<b>(127,904)</b>	<b>211,216</b>	<b>(15,541)</b>	<b>195,675</b>
Balances brought forward							
1 October 2021		1,573,091	7,849	1,580,940	1,379,375	5,890	1,385,265
Transfer Trustees ac/Min ac		(17,500)	17,500	0	(17,500)	17,500	0
Adjust p/y balances					0	0	
30 September 2022 C/f		<b>1,445,639</b>	<b>7,397</b>	<b>1,453,036</b>	<b>1,573,091</b>	<b>7,849</b>	<b>1,580,940</b>
General fund		1,445,639			1,573,091		
Congregation Funds	3	0	570		0	1,466	
Ministry Funds	4	0	6,760		0	6,383	
Special collection	5	0	67			0	
Balances carried forward							
30 September 2021 C/f		<b>1,445,639</b>	<b>7,397</b>	<b>1,453,036</b>	<b>1,573,091</b>	<b>7,849</b>	<b>1,580,940</b>

**FRAMLINGHAM UNITARIAN TRUST**

**BALANCE SHEET AS AT 30TH SEPTEMBER 2022**

	Notes	2022	2021
<b><u>Fixed Assets</u></b>	1		
Freehold Property		250,000	250,000
Fixtures and Fittings		12,201	12,201
Investments		<u>1,105,737</u>	<u>1,239,858</u>
		1,367,938	1,502,059
<b><u>Current Assets</u></b>			
Debtors/(Prepayment)		(6,476)	(5,380)
CBF Deposits		39,262	39,030
Barclays Cu ac		41,162	36,960
Barclays Ministry Ac		<u>14,325</u>	<u>13,104</u>
		88,273	83,714
<b><u>Current Liabilities</u></b>			
Creditors	2	<u>-3,175</u>	<u>-4,833</u>
<b><u>Net Current Assets</u></b>		85,098	78,881
<b><u>Total Net Assets</u></b>		<b><u>1,453,036</u></b>	<b><u>1,580,940</u></b>
<b>Represented by:</b>			
<b>Funds</b>			
Unrestricted		1,445,639	1,573,091
Restricted		<u>7,397</u>	<u>7,849</u>
		<b><u>1,453,036</u></b>	<b><u>1,580,940</u></b>

Approved by the Trustees on

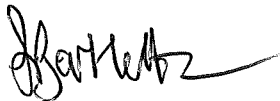
16/11/23

Signed on their behalf

Persephone Booth

Persephone C Booth, ATT(Fellow)  
Treasurer

Suzanne Bartlett  
Chairman



28.11.22

## FRAMLINGHAM UNITARIAN TRUST

### NOTES TO THE FINANCIAL STATEMENTS

For the year ending 30th September 2022

#### ACCOUNTING POLICIES

The financial statements have been prepared under the historical cost convention, except that investment assets are carried at market value, in accordance with the Charities Act Statement of Recommended Practice - Accounting and Reporting by Charities (SORP 2005).

#### FUNDS

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor or through the terms of the appeal.

#### INCOMING RESOURCES

All incoming resources are included in the statement of financial activities when the charity is entitled to the income and the amount can be quantified with reasonable accuracy.

The following specific policies are applied to particular categories of income.

Voluntary income received by way of grants, donations and gifts is included in full in the Statement of Financial Activities when receivable.

Investment income is included when receivable.

#### RESOURCES EXPENDED

Expenditure is recognised on an accrual basis as a liability is incurred. Expenditure includes any VAT which cannot be fully recovered, and is reported as part of the expenditure to which it relates.

NOTE 1 Fixed Assets	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total
	Funds	Funds	2022	Funds	Funds	2021
	£	£	£	£	£	£
<b>Freehold Property</b>						
Meeting House	50,000		50,000	50,000		50,000
Mill Yard Cottage (15 Bridge Street)	200,000		200,000	200,000		200,000
	<b>250,000</b>		<b>250,000</b>	<b>250,000</b>		<b>250,000</b>
<b>Fixtures and Fittings</b>						
Organ	11,000		11,000	11,000		11,000
Piano	981		981	981		981
Clock	220		220	220		220
	<b>12,201</b>		<b>12,201</b>	<b>12,201</b>		<b>12,201</b>
<b>Investments</b>						Total
J M Finn investments	1,105,737	0	1,105,737	1,239,858	0	1,239,858
	<b>1,105,737</b>	<b>0</b>	<b>1,105,737</b>	<b>1,239,858</b>	<b>0</b>	<b>1,239,858</b>

Investments held as fixed assets are revalued at market value at the balance sheet date and the gain or loss taken to the Statement of Financial Activities. All investments are now held by J M Finn Investment Managers.

<b>Investments continued</b>	<b>2022</b>	<b>2021</b>
Market value at 1 October 2021	1,239,858	1,045,654
Increase in value	0	194,204
Cash investments in year	0	0
Decrease in value	-134,121	0
Value at 30 September 2022	<u><u>1,105,737</u></u>	<u><u>1,239,858</u></u>

<b>NOTE 2 Liabilities</b>	<b>2022</b>	<b>2021</b>
Amounts falling due in one year		
Accounting FUT	812	250
Accounting Min ac	238	221
Miscellaneous	1798	4362
Ministry expense	327	0
	<u><u>3175</u></u>	<u><u>4833</u></u>

### **NOTE 3 Congregation Monies**

Opening balance	1.10.21	<b>1,466</b>	<b>696</b>
Add			
Collections & donations		391	517
membership fees		357	252
donation from MH Trustees		1,000	1,000
		<u>3,214</u>	<u>2,465</u>
Less Congregation expenses			
Admin costs	544		89
Sundry expenses	0		0
GA Quota	350		350
Ministers service fees	50		0
Organ playing	1,700		560
		<u>(2,644)</u>	<u>(999)</u>
Closing Balance of Congregation funds 30.9.22		<u><u>570</u></u>	<u><u>1,466</u></u>

### **NOTE 4 Ministry Account**

A new minister was appointed, and started work on 1st October 2014. The annual costs are to be paid for 50% by Framlingham and 50% by Bury St Edmunds.

Opening balance of Ministry funds 1.10.21	<b>6383</b>	<b>4665</b>
Fram contribution	20500	20500
BSE contribution	17500	17500
BSE contri to rent	3000	3000
Less Ministry expenses for year	(34,623)	(33,282)
Less rent	(6,000)	(6,000)
Balance of fund at 30.9.22	<u><u>6760</u></u>	<u><u>6383</u></u>

The fund balance as shown above differs from the bank balance due to timing issues of transfers between Min ac and Trustees ac.

### **NOTE 5 Special collection**

Bal b/f	0	529
Income - Café Connect	852	85
Income - Ukraine fund raiser	600	
Paid out	(1,385)	(614)
Balance	<u><u>67</u></u>	<u><u>0</u></u>
<b>Total restricted funds</b>	<u><u>7397</u></u>	<u><u>7849</u></u>

**FRAMLINGHAM UNITARIAN TRUST**

**UNITARIAN CHAPEL TRUST PROPERTY  
KNOWN AS "FRAMLINGHAM UNITARIAN TRUST"**

**Charity No: 262249**

**Treasurer:**

Mrs Persephone C Booth, ATT(Fellow)  
The Timbers, Church Road  
Kettleburgh  
Nr Woodbridge  
Suffolk IP13 7LE

**Secretary & Contact:**

Mrs Carly Holland  
4 Smiths Close  
Worlingworth  
Nr Woodbridge  
Suffolk IP13 7JG

**Accounts for year ending 30th September 2022**

1. Independent Examiner's Report
2. Statement of Financial Activities
3. Balance Sheet
4. Notes to the accounts

*Prepared by Persephone C Booth, ATT(Fellow)  
The Timbers, Church Road, Kettleburgh, Nr Woodbridge, Suffolk IP13 7LE  
Tel: 01728-724421 email: persephone.booth@gmail.com*

**FRAMLINGHAM UNITARIAN TRUST**  
**Independent Examiner's Report to the Trustees of**  
**Framlingham Unitarian Trust**

I report on the accounts of the Charity for the year ended 30<sup>th</sup> September 2022 which are set out on pages 2 to 5.

**Respective responsibilities of the trustees and examiner**

As the charity's trustees, you are responsible for the preparation of accounts. The charity's trustees consider that an audit is not required for this year under section 43 (2) of the Charities Act 1993 (the 1993 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 43 of the 1993 Act;
- to follow the procedure laid down in the general Directions given by the Charity Commission under section 43(7)(b) of the 1993 Act; and
- to state whether particular matters have come to my attention.

**Basis of Independent Examiner's Report**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

**Independent Examiner's Statement**

In connection with my examination, no matter has come to my attention

1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with Section 41 of the 1993 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 1993 Act
- have not been met; or

2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Miss Rachel Parker  
2 Park Corner  
Tuddenham St Martin  
Nr Ipswich  
Suffolk IP6 9DE



Dated: 6/2/2023

FRAMLINGHAM UNITARIAN TRUST

STATEMENT OF FINANCIAL ACTIVITIES  
For the year ending 30th September 2022

	Notes	2022			2021		
		Unrestricted	Restricted	Totals	Unrestricted	Restricted	Totals
<b>INCOMING RESOURCES</b>							
Income from investments							
Finn investment dividends		38,598		38,598	32,253		32,253
COIF interest		231		231	5		5
Hire		3,418		3,418	995		995
Donations/Grants/Fees		39		39	315		315
Congregation monies	3	-1,000	1,748	748	-1,000	1,769	769
Special collection/Café Connect			1,452	1,452		212	212
Bury St Edmunds contribution		0	20,500	20,500	0	20,500	20,500
Rent - 15 Bridge St (from Bury)		3,000	(3,000)	0	3,000	(3,000)	0
<b>TOTAL INCOMING RESOURCES</b>		<b>44,286</b>	<b>20,700</b>	<b>64,986</b>	<b>35,568</b>	<b>19,481</b>	<b>55,049</b>
<b>RESOURCES EXPENDED</b>							
Insurance		1,432		1,432	1,392		1,392
Wages		5,724		5,724	4,136		4,136
Repairs and Maintenance		4,479		4,479	2,988		2,988
Organ & piano repairs		269		269	340		340
Accounting		2,362		2,362	1,858		1,858
Professional fees		1,119		1,119	0		0
Travel expenses		0		0	127		127
Utilities		1,888		1,888	1,863		1,863
Miscellaneous expenses		1,471		1,471	2,050		2,050
Ministry expenses	4		34,623	34,623		33,282	33,282
Rental Property expenses		1,372		1,372	3,803		3,803
Charitable dons/Café Connect		0	1,385	1,385	0	741	741
Congregation Expenses	3		2,644	2,644		999	999
<b>TOTAL RESOURCES EXPENDED</b>		<b>20,116</b>	<b>38,652</b>	<b>58,768</b>	<b>18,557</b>	<b>35,022</b>	<b>53,579</b>
<b>NET INCOMING RESOURCES</b>		<b>24,170</b>	<b>(17,952)</b>	<b>6,218</b>	<b>17,011</b>	<b>(15,541)</b>	<b>1,470</b>
Gains/(Loss) on investments		(134,122)	0	(134,122)	194,205	0	194,205
Change in valuation of 15 Bridge St		0		0	0		0
<b>NET MOVEMENT IN FUNDS</b>		<b>(109,952)</b>	<b>(17,952)</b>	<b>(127,904)</b>	<b>211,216</b>	<b>(15,541)</b>	<b>195,675</b>
Balances brought forward							
1 October 2021		1,573,091	7,849	1,580,940	1,379,375	5,890	1,385,265
Transfer Trustees ac/Min ac		(17,500)	17,500	0	(17,500)	17,500	0
Adjust p/y balances					0	0	
30 September 2022 C/f		<b>1,445,639</b>	<b>7,397</b>	<b>1,453,036</b>	<b>1,573,091</b>	<b>7,849</b>	<b>1,580,940</b>
General fund		1,445,639			1,573,091		
Congregation Funds	3	0	570		0	1,466	
Ministry Funds	4	0	6,760		0	6,383	
Special collection	5	0	67			0	
Balances carried forward							
30 September 2021 C/f		<b>1,445,639</b>	<b>7,397</b>	<b>1,453,036</b>	<b>1,573,091</b>	<b>7,849</b>	<b>1,580,940</b>

**FRAMLINGHAM UNITARIAN TRUST**

**BALANCE SHEET AS AT 30TH SEPTEMBER 2022**

	Notes	2022	2021
<b><u>Fixed Assets</u></b>	1		
Freehold Property		250,000	250,000
Fixtures and Fittings		12,201	12,201
Investments		<u>1,105,737</u>	<u>1,239,858</u>
		1,367,938	1,502,059
<b><u>Current Assets</u></b>			
Debtors/(Prepayment)		(6,476)	(5,380)
CBF Deposits		39,262	39,030
Barclays Cu ac		41,162	36,960
Barclays Ministry Ac		<u>14,325</u>	<u>13,104</u>
		88,273	83,714
<b><u>Current Liabilities</u></b>			
Creditors	2	<u>-3,175</u>	<u>-4,833</u>
<b><u>Net Current Assets</u></b>		85,098	78,881
<b><u>Total Net Assets</u></b>		<b><u>1,453,036</u></b>	<b><u>1,580,940</u></b>
<b>Represented by:</b>			
<b>Funds</b>			
Unrestricted		1,445,639	1,573,091
Restricted		<u>7,397</u>	<u>7,849</u>
		<b><u>1,453,036</u></b>	<b><u>1,580,940</u></b>

Approved by the Trustees on

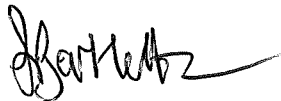
16/11/23

Signed on their behalf

Persephone Booth

Persephone C Booth, ATT(Fellow)  
Treasurer

Suzanne Bartlett  
Chairman



28.11.22

## FRAMLINGHAM UNITARIAN TRUST

### NOTES TO THE FINANCIAL STATEMENTS

For the year ending 30th September 2022

#### ACCOUNTING POLICIES

The financial statements have been prepared under the historical cost convention, except that investment assets are carried at market value, in accordance with the Charities Act Statement of Recommended Practice - Accounting and Reporting by Charities (SORP 2005).

#### FUNDS

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor or through the terms of the appeal.

#### INCOMING RESOURCES

All incoming resources are included in the statement of financial activities when the charity is entitled to the income and the amount can be quantified with reasonable accuracy.

The following specific policies are applied to particular categories of income.

Voluntary income received by way of grants, donations and gifts is included in full in the Statement of Financial Activities when receivable.

Investment income is included when receivable.

#### RESOURCES EXPENDED

Expenditure is recognised on an accrual basis as a liability is incurred. Expenditure includes any VAT which cannot be fully recovered, and is reported as part of the expenditure to which it relates.

NOTE 1 Fixed Assets	Unrestricter	Restrictec	Total	Unrestricter	Restrictec	Total
	Funds	Funds	2022	Funds	Funds	2021
	£	£	£	£	£	£
<b>Freehold Property</b>						
Meeting House	50,000		50,000	50,000		50,000
Mill Yard Cottage (15 Bridge Street)	200,000		200,000	200,000		200,000
	<b>250,000</b>		<b>250,000</b>	<b>250,000</b>		<b>250,000</b>
<b>Fixtures and Fittings</b>						
Organ	11,000		11,000	11,000		11,000
Piano	981		981	981		981
Clock	220		220	220		220
	<b>12,201</b>		<b>12,201</b>	<b>12,201</b>		<b>12,201</b>
<b>Investments</b>						Total
J M Finn investments	1,105,737	0	1,105,737	1,239,858	0	1,239,858
	<b>1,105,737</b>	<b>0</b>	<b>1,105,737</b>	<b>1,239,858</b>	<b>0</b>	<b>1,239,858</b>

Investments held as fixed assets are revalued at market value at the balance sheet date and the gain or loss taken to the Statement of Financial Activities. All investments are now held by J M Finn Investment Managers.

<b>Investments continued</b>	<b>2022</b>	<b>2021</b>
Market value at 1 October 2021	1,239,858	1,045,654
Increase in value	0	194,204
Cash investments in year	0	0
Decrease in value	-134,121	0
Value at 30 September 2022	<u><u>1,105,737</u></u>	<u><u>1,239,858</u></u>

<b>NOTE 2 Liabilities</b>	<b>2022</b>	<b>2021</b>
Amounts falling due in one year		
Accounting FUT	812	250
Accounting Min ac	238	221
Miscellaneous	1798	4362
Ministry expense	327	0
	<u><u>3175</u></u>	<u><u>4833</u></u>

### **NOTE 3 Congregation Monies**

Opening balance	1.10.21	<b>1,466</b>	<b>696</b>
Add			
Collections & donations		391	517
membership fees		357	252
donation from MH Trustees		1,000	1,000
		<u>3,214</u>	<u>2,465</u>
Less Congregation expenses			
Admin costs	544		89
Sundry expenses	0		0
GA Quota	350		350
Ministers service fees	50		0
Organ playing	1,700		560
		<u>(2,644)</u>	<u>(999)</u>
Closing Balance of Congregation funds 30.9.22		<u><u>570</u></u>	<u><u>1,466</u></u>

### **NOTE 4 Ministry Account**

A new minister was appointed, and started work on 1st October 2014. The annual costs are to be paid for 50% by Framlingham and 50% by Bury St Edmunds.

Opening balance of Ministry funds 1.10.21	<b>6383</b>	<b>4665</b>
Fram contribution	20500	20500
BSE contribution	17500	17500
BSE contri to rent	3000	3000
Less Ministry expenses for year	(34,623)	(33,282)
Less rent	(6,000)	(6,000)
Balance of fund at 30.9.22	<u><u>6760</u></u>	<u><u>6383</u></u>

The fund balance as shown above differs from the bank balance due to timing issues of transfers between Min ac and Trustees ac.

### **NOTE 5 Special collection**

Bal b/f	0	529
Income - Café Connect	852	85
Income - Ukraine fund raiser	600	
Paid out	(1,385)	(614)
Balance	<u><u>67</u></u>	<u><u>0</u></u>
<b>Total restricted funds</b>	<u><u>7397</u></u>	<u><u>7849</u></u>

**UNITARIAN CHAPEL TRUST PROPERTY**

England & Wales - Charity number 262249

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# Accounts

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**FRAMLINGHAM UNITARIAN TRUST**

**UNITARIAN CHAPEL TRUST PROPERTY  
KNOWN AS "FRAMLINGHAM UNITARIAN TRUST"**

**Charity No: 262249**

**Treasurer:**

Mrs Persephone C Booth, ATT(Fellow)  
The Timbers, Church Road  
Kettleburgh  
Nr Woodbridge  
Suffolk IP13 7LE

**Secretary & Contact:**

Mrs Angela Hatt  
Meadow Rise  
Mount Pleasant  
Framlingham  
Nr Woodbridge  
Suffolk IP13 9HL

**Accounts for year ending 30th September 2021**

1. Independent Examiner's Report
2. Statement of Financial Activities
3. Balance Sheet
4. Notes to the accounts

*Prepared by Persephone C Booth, ATT(Fellow)*

*The Timbers, Church Road, Kettleburgh, Nr Woodbridge, Suffolk IP13 7LE*

*Tel: 01728-724421 email: persephone.booth@gmail.com*

**FRAMLINGHAM UNITARIAN TRUST**  
**Independent Examiner's Report to the Trustees of**  
**Framlingham Unitarian Trust**

I report on the accounts of the Charity for the year ended 30<sup>th</sup> September 2021 which are set out on pages 2 to 5.

**Respective responsibilities of the trustees and examiner**

As the charity's trustees, you are responsible for the preparation of accounts. The charity's trustees consider that an audit is not required for this year under section 43 (2) of the Charities Act 1993 (the 1993 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 43 of the 1993 Act;
- to follow the procedure laid down in the general Directions given by the Charity Commission under section 43(7)(b) of the 1993 Act; and
- to state whether particular matters have come to my attention.

**Basis of Independent Examiner's Report**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

**Independent Examiner's Statement**

In connection with my examination, no matter has come to my attention

1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with Section 41 of the 1993 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 1993 Act
- have not been met; or

2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Miss Rachel Parker  
2 Park Corner  
Tuddenham St Martin  
Nr Ipswich  
Suffolk IP6 9DE



Dated: 17 Feb '22

**FRAMLINGHAM UNITARIAN TRUST**

**STATEMENT OF FINANCIAL ACTIVITIES**  
For the year ending 30th September 2021

	Notes	2021			2020		
<b>INCOMING RESOURCES</b>		Unrestricted	Restricted	Totals	Unrestricted	Restricted	Totals
Income from investments							
Finn investment dividends		32,253		32,253	38,837		38,837
COIF interest		5		5	157		157
Hire		995		995	1,825		1,825
Donations/Grants/Fees		315		315	0		0
Congregation monies	3	-1,000	1,769	769	0	752	752
Special collection/Café Connect			212	212		433	433
Bury St Edmunds contribution		0	20,500	20,500	0	20,000	20,000
Rent - 15 Bridge St (from Bury)		3,000	(3,000)	0	3,000	(3,000)	0
<b>TOTAL INCOMING RESOURCES</b>		<b>35,568</b>	<b>19,481</b>	<b>55,049</b>	<b>43,819</b>	<b>18,185</b>	<b>62,004</b>
<b>RESOURCES EXPENDED</b>							
Insurance		1,392		1,392	1,318		1,318
Wages		4,136		4,136	4,302		4,302
Repairs and Maintenance		2,988		2,988	5,763		5,763
Organ & piano repairs		340		340	381		381
Accounting		1,858		1,858	2,183		2,183
Professional fees		0		0	540		540
Travel expenses		127		127	651		651
Utilities		1,863		1,863	1,656		1,656
Miscellaneous expenses		2,050		2,050	2,335		2,335
Ministry expenses	4		33,282	33,282		32,747	32,747
Rental Property expenses		3,803		3,803	188		188
Charitable dons/Café Connect		0	741	741	610	0	610
Congregation Expenses	3		999	999		1,379	1,379
<b>TOTAL RESOURCES EXPENDED</b>		<b>18,557</b>	<b>35,022</b>	<b>53,579</b>	<b>19,927</b>	<b>34,126</b>	<b>54,053</b>
<b>NET INCOMING RESOURCES</b>		<b>17,011</b>	<b>(15,541)</b>	<b>1,470</b>	<b>23,892</b>	<b>(15,941)</b>	<b>7,951</b>
Gains/(Loss) on investments		194,205	0	194,205	(157,899)	0	(157,899)
Change in valuation of 15 Bridge St		0		0	0		0
<b>NET MOVEMENT IN FUNDS</b>		<b>211,216</b>	<b>(15,541)</b>	<b>195,675</b>	<b>(134,007)</b>	<b>(15,941)</b>	<b>(149,948)</b>
Balances brought forward							
1 October 2020		1,379,375	5,890	1,385,265	1,530,894	4,319	1,535,213
Transfer Trustees ac/Min ac		(17,500)	17,500	0	(17,500)	17,500	0
Adjust p/y balances					(12)	12	
30 September 2021 C/f		<b>1,573,091</b>	<b>7,849</b>	<b>1,580,940</b>	<b>1,379,375</b>	<b>5,890</b>	<b>1,385,265</b>
General fund		1,573,091			1,379,375		
Congregation Funds	3	0	1,466		0	696	
Ministry Funds	4	0	6,383		0	4,665	
Special collection	5	0	0			529	
Balances carried forward							
30 September 2021 C/f		<b>1,573,091</b>	<b>7,849</b>	<b>1,580,940</b>	<b>1,379,375</b>	<b>5,890</b>	<b>1,385,265</b>

**FRAMLINGHAM UNITARIAN TRUST**

**BALANCE SHEET AS AT 30TH SEPTEMBER 2021**

	Notes	<b>2021</b>	<b>2020</b>
<b><u>Fixed Assets</u></b>	1		
Freehold Property		250,000	250,000
Fixtures and Fittings		12,201	12,201
Investments		<u>1,239,858</u>	<u>1,045,654</u>
		1,502,059	1,307,855
<b><u>Current Assets</u></b>			
Debtors/(Prepayment)		(5,380)	(2,380)
CBF Deposits		39,030	39,025
Barclays Cu ac		36,960	29,950
Barclays Ministry Ac		<u>13,104</u>	<u>14,265</u>
		83,714	80,860
<b><u>Current Liabilities</u></b>			
Creditors	2	<u>-4,833</u>	<u>-3,450</u>
<b><u>Net Current Assets</u></b>		78,881	77,410
<b><u>Total Net Assets</u></b>		<b><u>1,580,940</u></b>	<b><u>1,385,265</u></b>
<b>Represented by:</b>			
<b>Funds</b>			
Unrestricted		1,573,091	1,379,375
Restricted		<u>7,849</u>	<u>5,890</u>
		<b><u>1,580,940</u></b>	<b><u>1,385,265</u></b>

Approved by the Trustees on 14 Dec 2021

Signed on their behalf

*Persephone Booth*

Persephone C Booth, ATT(Fellow)  
Treasurer

*B. Chilton*

Bruce Chilton  
Chairman

## FRAMLINGHAM UNITARIAN TRUST

### NOTES TO THE FINANCIAL STATEMENTS

For the year ending 30th September 2021

#### ACCOUNTING POLICIES

The financial statements have been prepared under the historical cost convention, except that investment assets are carried at market value, in accordance with the Charities Act Statement of Recommended Practice - Accounting and Reporting by Charities (SORP 2005).

#### FUNDS

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor or through the terms of the appeal.

#### INCOMING RESOURCES

All incoming resources are included in the statement of financial activities when the charity is entitled to the income and the amount can be quantified with reasonable accuracy.

The following specific policies are applied to particular categories of income.

Voluntary income received by way of grants, donations and gifts is included in full in the Statement of Financial Activities when receivable.

Investment income is included when receivable.

#### RESOURCES EXPENDED

Expenditure is recognised on an accrual basis as a liability is incurred. Expenditure includes any VAT which cannot be fully recovered, and is reported as part of the expenditure to which it relates.

#### NOTE 1 Fixed Assets

	Unrestricted Funds £	Restricted Funds £	Total 2021 £	Unrestricted Funds £	Restricted Funds £	Total 2020 £
<b>Freehold Property</b>						
Meeting House	50,000		50,000	50,000		50,000
Mill Yard Cottage (15 Bridge Street)	200,000		200,000	200,000		200,000
	<b>250,000</b>		<b>250,000</b>	<b>250,000</b>		<b>250,000</b>
<b>Fixtures and Fittings</b>						
Organ	11,000		11,000	11,000		11,000
Piano	981		981	981		981
Clock	220		220	220		220
	<b>12,201</b>		<b>12,201</b>	<b>12,201</b>		<b>12,201</b>
<b>Investments</b>						Total
J M Finn investments	1,239,858	0	1,239,858	1,102,194	0	1,102,194
	<b>1,239,858</b>	<b>0</b>	<b>1,239,858</b>	<b>1,102,194</b>	<b>0</b>	<b>1,102,194</b>

Investments held as fixed assets are revalued at market value at the balance sheet date and the gain or loss taken to the Statement of Financial Activities. All investments are now held by J M Finn Investment Managers.

<b>Investments continued</b>	<b>2021</b>	<b>2020</b>
Market value at 1 October 2020	1,045,654	1,203,553
Increase in value	194,204	0
Cash investments in year	0	0
Decrease in value	0	-157,899
Value at 30 September 2021	<u><u>1,239,858</u></u>	<u><u>1,045,654</u></u>

<b>NOTE 2 Liabilities</b>	<b>2021</b>	<b>2020</b>
Amounts falling due in one year		
Accounting FUT	250	350
Accounting Min ac	221	100
Miscellaneous	4362	3000
Ministry expense	0	0
	<u><u>4833</u></u>	<u><u>3450</u></u>

### NOTE 3 Congregation Monies

Opening balance	1.10.20	<b>696</b>	<b>1,323</b>
Add			
Collections & donations		517	353
membership fees		252	399
donation from MH Trustees		1,000	0
		<u>2,465</u>	<u>2,075</u>
Less Congregation expenses			
Admin costs	89		277
Sundry expenses	0		37
GA Quota	350		385
Ministers service fees	0		50
Organ playing	560		630
		<u>(999)</u>	<u>(1,379)</u>
Closing Balance of Congregation funds 30.9.21		<u><u>1,466</u></u>	<u><u>696</u></u>

### NOTE 4 Ministry Account

A new minister was appointed, and started work on 1st October 2014. The annual costs are to be paid for 50% by Framlingham and 50% by Bury St Edmunds.

Opening balance of Ministry funds 1.10.20	<b>4665</b>	<b>2900</b>
Fram contribution	20500	20500
BSE contribution	17500	17000
BSE contri to rent	3000	3000
Less Ministry expenses for year	(33,282)	(32,735)
Less rent	(6,000)	(6,000)
Balance of fund at 30.9.21	<u><u>6383</u></u>	<u><u>4665</u></u>

The fund balance as shown above differs from the bank balance due to timing issues of transfers between Min ac and Trustees ac.

### NOTE 5 Special collection

Bal b/f	529	96
Income	85	433
Paid out	(614)	0
Balance	<u><u>0</u></u>	<u><u>529</u></u>

<b>Total restricted funds</b>	<u><u>7849</u></u>	<u><u>5890</u></u>
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**The Trustees of the Unitarian Meeting House  
Framlingham, Suffolk**

**Annual Report for the year ended 30 September 2021**

The Trustees submit their Annual Report on the affairs of the charity together with the financial statement for the year ended 30 September 2021.

**Principal Activity**

The principal activity of the Trust in the year under review was the discharge of the duties of Trustees of the trusts for which they are responsible.

**The Trustees**

The Managing Trustees shall consist, when complete, of a body of eight persons of the Unitarian persuasion.

**Trustees serving during the year were as follows:**

Mr Bruce Chilton  
22 Marston Lane  
Norwich  
Norfolk  
NR4 6LZ

Appointed 15 June 2003

Mr Ewout Van-Manen  
Flat 1, 2/4 High Street  
Saxmundham  
IP17 1DD

Appointed 30 March 2020

Mr Edward Thompson  
143 High Street  
Harrold  
Bedford MK43 7ED  
Appointed December 2008

Mr John McEwan  
22 Double Street  
Framlingham  
IP13 9BN  
Appointed September 2007

Mr David Owen  
5 Albert Place  
Framlingham  
IP13 9DX  
Appointed June 2011

Mr Martin Croucher  
Trinity Cottage  
Bridge Street  
Rendham  
Suffolk  
IP17 2AZ

Appointed October 2013

Mrs Persephone Booth  
The Timbers  
Church Road  
Kettleburgh  
Woodbridge  
Suffolk  
IP13 7LE

Appointed October 2013

Mrs Suzanne Jane Vyvyan Bartlett  
3 Victoria Mill Road  
Framlingham  
Woodbridge  
Suffolk  
Appointed 30 March 2020

**Custodial Trustee**

British and Foreign Unitarian Association Inc  
Essex Hall  
1-6 Essex Street  
London  
WC2R 3HY

Charity Number 255205

## Professional Advisors

### Bank

Barclays Bank PLC  
Princes Street  
Ipswich  
Suffolk

### Accountant

Persephone Booth  
The Timbers  
Church Road  
Kettleburgh  
Suffolk IP13 7LE

### Solicitors

John Pulham  
Pulham & Co  
11 Market Place  
Saxmundham  
Suffolk

## Financial Advisors

Kevin Froggatt DipPFS  
Lucas Fettes Financial Planning  
3-4 Willow Farm  
Allwood Green  
Rickingham  
Diss  
Norfolk  
IP22 1LQ

2020-2021 was a mixed year as far as community activities, social events and face to face services were concerned. Whilst the Covid restrictions were revised at various times during the year, the Meeting House remained closed to all users for the majority of the time. If events were held they were very restricted.

Our Minister, Matthew Smith, worked tirelessly, along with the congregational committee, to reach out to all members of the community and the weekly services were continued via Zoom in conjunction with some members of Bury St Edmunds. Obviously no hirings were made during this period, thus reducing our income, however our investments were slowly getting back on track and on the whole, our income covered out outgoings.

At the time of writing, January 2022, there are encouraging signs of stability returning to the UK and more importantly, to our community.

Signed



Date

25.2.2022.