



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## **Trustees' Annual Report for the period**

**From 6<sup>th</sup> April 2021 To 5<sup>th</sup> April 2022**

**Charity name: The Benjamin Winegarten Charitable Trust**

**Charity registration number: 271442**

## **Objectives and Activities**

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<b>The charity was formed in 1976 and is governed by its trust deed dated 12 March 1976. The charity has continued with its activities in particular for the relief of poverty and for the purposes of advancement of religion and religious education.</b>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<b>The charity provides donations and grants to institutions of religious education and religious organisations as well as other charities working for the relief of poverty. Through its involvement in the local community it also provides donations and grants to individual referrals in social need.</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>The trustees have regard to the guidance issued by the Charity Commission on public benefit in all aspects of how the charity is run and carries out its purpose.</b>

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.202	<p><b>The charity made grants to other charitable institutions during the year to £91,328 (2022 £204,030). There were no donations and grants to individuals (2022 £Nil).</b></p> <p><b>In monitoring performance, the charity receives regular updates from the causes to which it has given support and carefully reviews the progress of those concerned. Such feedback is an influence on future policy for grants and awards.</b></p>

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<b>The trustees report that income has remained stable, while at the same time they have felt able to increase charitable grants and donations during the year. Indications for the ensuing year are that income will balance expenditure.</b>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<b>The trustees maintain reserves in order that levels of grants can be maintained throughout the economic cycle and to support longer term projects.</b>
Amount of reserves held	Para 1.22	<b>At 5<sup>th</sup> April 2023 the charity held reserves of £2,381,090 all of which are Unrestricted Funds (2022: £2,324,309).</b>
Reasons for holding zero reserves	Para 1.22	<b>Not applicable</b>
Details of fund materially in deficit	Para 1.24	<b>Not applicable</b>
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<b>Not applicable</b>

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document	Para 1.25	<b>Trust Deed dated 12<sup>th</sup> March 1976</b>
How is the charity constituted?	Para 1.25	<b>The charity is unincorporated.</b>
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<b>The Trustees in conjunction with their professional advisors deal with all matters relating to policy making and day to day administration including grant making, investment, reserves and risk management, policies and performance. The Board keeps the skill requirements of the Trustee Body under review and seeks professional advice where it deems appropriate. The trustees have the power to appoint additional trustees as considered necessary.</b>

## Reference and Administrative details

Charity name	The Benjamin Winegarten Charitable Trust
Other name the charity uses	
Registered charity number	271442
Charity's principal address	25 St Andrews Grove Stoke Newington London N16 5NF

**Names of the charity trustees who manage the charity**

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	E Winegarten			
	S Winegarten			
	L Chontow			
2	M Schwab			

**Funds held as custodian trustees on behalf of others**

Description of the assets held in this capacity	Not applicable
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity’s objects	Not applicable
Details of arrangements for safe custody and segregation of such assets from the charity’s own assets	Not applicable

**Declarations**

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

Signed on behalf of the charity’s trustees

Signature(s)		
Full name(s)	S Winegarten	E Winegarten
Position (eg Secretary, Chair, etc)	Trustee	Trustee
Date	26/01/2024	



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Signed on behalf of the charity’s trustees

Signature(s)		
Full name(s)	S Winegarten	E Winegarten
Position (eg Secretary, Chair, etc)	Trustee	Trustee
Date	26/01/2024	



# Independent examiner's report on the accounts



CHARITY COMMISSION  
FOR ENGLAND AND WALES

## Section A

## Independent Examiner's Report

**Report to the trustees/  
members of**

Charity Name  
The Benjamin Winegarten Charitable Trust

**On accounts for the year  
ended**

5<sup>th</sup> April 2023

**Charity no  
(if any)**

271442

**Set out on pages**

1 – 15

**Respective  
responsibilities of  
trustees and examiner**

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 ("the Charities Act") and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

**Basis of independent  
examiner's statement**

My examination was carried out in accordance with 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 the trustees concerning any 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 (other than that disclosed below \*)

1. which gives me reasonable cause to believe that in, any material respect, the requirements:
  - to keep accounting records in accordance with section 130 of the Charities Act; and
  - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities 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.

*\* Please delete the words in the brackets if they do not apply.*

**Signed:**

**Date:**

26/01/2024

**Name:**

Kenneth Edwin Clarke, FCA

<b>Relevant professional qualification(s) or body (if any):</b>	Chartered Accountant
<b>Address:</b>	35 Hornbeam Road
	Theydon Bois, Epping
	Essex, CM16 7JU

Section B	Disclosure
	<p>Only complete if the examiner needs to highlight material problems.(E.g. accounting records have not been kept in accordance with s132 of the Charities' Act 2011 and those accounts do not comply with the requirements of the 2008 Regulations setting out the form and content of charity accounts; any material expenditure or action which appears not to be in accordance with the trusts of the charity; any failure to be provided with information and explanations by any past or present trustee, officer or employee; and any material consistency between the accounts and the trustees' annual report.)</p>

Give here brief details of any items that the examiner wishes to disclose.

NONE