BRIESS FAMILY CHARITABLE TRUST

England & Wales · Charity number 272721

Details

Other names	H J B CHARITABLE TRUST, THE BRIESS FAMILY CHARITABLE TRUST
Status	Registered
Legal form	Trust
Registered	1977-02-01
Register	View on the Charity Commission register

Contact

Address	12 Cenacle Close London NW3 7UE
Phone	02074353176
Email	pbriess@btinternet.com

Activities

Objects: TO SUCH CHARITIES OR FOR SUCH CHARITABLE PURPOSES AS THE SETTLORS MAY JOINTLY FROM TIME TO TIME DIRECT AND SUBJECT TO AND IN DEFAULT OF ANY SUCH DIRECTION MAY NOT EXTEND AS THE TRUSTEES MAY AT THEIR UNCONTROLLED DISCRETION DETERMINE

Activities: The Briess Family Charitable Trust is an independent grant-making family-run trust and makes donations to registered charities at the discretion of the Trustees. The Briess Family Charitable Trust does not accept unsolicited applications for support.

Classification

- **How:** Makes Grants To Organisations
- **What:** General Charitable Purposes, Education/training, The Advancement Of Health Or Saving Of Lives, Disability, The Prevention Or Relief Of Poverty, Overseas Aid/famine Relief, Arts/culture/heritage/science, Environment/conservation/heritage
- **Who:** Children/young People, Elderly/old People, People With Disabilities, Other Charities Or Voluntary Bodies

Downloaded from opencharities.uk/ew/272721

Geography

- Israel
- Barnet
- Camden
- City Of London

Finances

Period end	Income	Expenditure	Assets	Employees
2025-01-31	£189,577	£158,051	-	-
2024-01-31	£75,891	£91,226	-	-
2023-01-31	£4,042	£72,485	-	-
2022-01-31	£5,172	£34,795	-	-
2021-01-31	£40,000	£5,273	-	-

Trustees

Name	Role	Appointed
P BRIESS	Chair	
Bridget Kohner		2018-11-21
Dr DAVID ANDREW BRIESS		

Downloaded from opencharities.uk/ew/272721

BRIESS FAMILY CHARITABLE TRUST

England & Wales - Charity number 272721

Accounts

BRIESS FAMILY CHARITABLE TRUST

TRUSTEES' REPORT AND FINANCIAL STATEMENTS

31 JANUARY 2025

CHARITY NUMBER : 272721

Grant Harrod Lerman Davis LLP
Chartered Accountants
Second Floor, Kirkland House
11-15 Peterborough Road
Harrow
HA1 2AX

BRIESS FAMILY CHARITABLE TRUST

ANNUAL REPORT AND FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 JANUARY 2025

Contents

Page	
1	Charity information
2	Report of the Trustees
3	Accountant's Report
4	Statement of Financial Activities (Incorporating the Income and Expenditure Account)
5	Statement of Assets and Liabilities
6 -7	Notes forming part of the Financial Statements

BRIESS FAMILY CHARITABLE TRUST

CHARITY INFORMATION

FOR THE YEAR ENDED 31 JANUARY 2025

Charity Number	272721
Trustees	Peter Briess Bridget Kohner David Andrew Briess
Charity office	12 Cenacle Close London NW3 7UE
Accountants	Grant Harrod Lerman Davis LLP Chartered Accountants Second Floor, Kirkland House 11-15 Peterborough Road Harrow HA1 2AX

BRIESS FAMILY CHARITABLE TRUST

TRUSTEES' REPORT FOR THE YEAR ENDED 31 JANUARY 2025

The trustees present their report and accounts for the year ended 31 January 2025

Trustees

The trustees named below have served throughout the year:

Peter Briess
Bridget Kohner
David Andrew Briess

Appointment of trustees is governed by the Trust Deed of the charity. The Board of Trustees is authorised to appoint new trustees to fill vacancies arising through resignation or death of an existing trustee.

Objects of the society, principal activities and organisation

The Charitable Trust is constituted by the Trust Deed created when the charity was formed in 27 November 1976 and amended on 14 August 2018 and 28 April 2022

The objects of the charity are to such charities or for such charitable purposes as the settlors may jointly from time to time direct and subject to and in default of any such direction may not extend as the trustees may at their uncontrolled discretion determine.

The charity is run by the trustees with no employees.

The Briess Family Charitable Trust is an independent grant-making family-run trust and makes donations to registered charities at the discretion of the trustees.

The trustees undertake to identify and support organisations that following causes

1) Refugee relief
2) Educational and training schemes
3) Holocaust memorialisation and education
4) Environmental and wildlife conservation
5) Medical and scientific research

In providing financial support, the trustees are always mindful that this will benefit the wider public.

The trustees do not cosider unsolicited applications for funding

The trustees will approach potential partners that operate in the areas that the trusts seeks to support. Where funding is provided, the trustees seek to offer long term assistance.

Development, activities and achievements this year

The trustees provided £104,248 of financial assistance in the year to 31 January 2025. The trustees allocated this financial support as follows.

Research and support for Anaphylaxis	£52,450
Support for Holocaust education and Jewish charities	£41,550
Support for children charities	£5,000
Support for health and humanitarian causes	£4,148
Support for animal charities	£1,100

Financial review

The trustees seek to maintain a level of reserves that will enable them to provide continuing financial support for the duration of projects that they have committed to assist.

This report has been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities (issued March 2005).

This report was approved by the trustees on XX XXXX XXXX and signed on their behalf.

.....

Date : 20 OCT. 2025

BRIESS FAMILY CHARITABLE TRUST

INDEPENDENT EXAMINERS' REPORT TO THE TRUSTEES OF

BRIESS FAMILY CHARITABLE TRUST

FOR THE YEAR ENDED 31 JANUARY 2025

I report to the charity trustees on my examination of the accounts of Briess Family Charitable Trust (the trust) for the year ended 31 January 2025.

Respective responsibilities of trustees and examiner

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Trust's accounts carried out under Section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under Section 145(5)(b) of the Act.

Independent examiners' statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1 accounting records were not kept in respect of the Trust as required by Section 130 of the Act; or
2 the accounts do not accord with those records; or
3 the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination.

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

Jeremy Harrod FCCA

Date : 20/10/25

Grant Harrod Lerman Davis LLP
Chartered Accountants
Second Floor, Kirkland House
11-15 Peterborough Road
Harrow

BRIESS FAMILY CHARITABLE TRUST

STATEMENT OF FINANCIAL ACTIVITIES

FOR THE YEAR ENDED 31 JANUARY 2025

SUMMARY RECEIPTS AND PAYMENTS ACCOUNT

	NOTES	Unrestricted Funds £	Restricted Funds £	Total £ 2025	Total Funds £ 2024
RECEIPTS					
Receipts from generated funds					
Investment income	3	5,823	-	5,823	4,270
Receipts from charitable activities					
Grants and donations	2	68,964	-	68,964	10,000
Receipts from asset and investment sales					
Sale of investments		114,790	-	114,790	61,621
Total incoming resources		£189,577	-	£189,577	£75,891
Payments					
Costs of generating funds		-	-	-	-
Charitable activities	4	105,548	-	105,548	87,498
Governance costs	4	1,620	-	1,620	3,728
Payments for asset and investment purchases					
Purchase of investments		50,883	-	50,883	-
Total resources expended		£158,051	-	£158,051	£91,226
Net incoming/(outgoing) resources		31,526	-	31,526	-15,335
Reconciliation of funds					
Total funds brought forward		31,287	-	31,287	46,622
Total funds carried forward		£62,813	-	£62,813	£31,287

The statement of financial activities includes all gains and losses in the year. All incoming resources and resources expended derive from continuing activities.

The notes on pages 6 to 7 form an integral part of these Financial Statements.

BRIESS FAMILY CHARITABLE TRUST

STATEMENT OF ASSETS AND LIABILITIES AS AT 31 JANUARY 2025

	NOTES	2025 £	2025 £	2024 £	2024 £
Current Assets					
Investments - Market Value		261,915		253,098	
Cash at Bank and Deposits		62,813		31,287	
		324,728		284,385	
CREDITORS:					
Amounts falling due within one year		-		-	
Net Current Assets			324,728		284,385
TOTAL ASSETS LESS CURRENT LIABILITIES			£324,728		£284,385

BRIESS FAMILY CHARITABLE TRUST

NOTES TO THE ACCOUNTS

31 JANUARY 2025

1. Accounting Policies

a. Basis of Accounting

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)' Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011. The financial statements have been prepared under the receipts and payments basis.

b. Income

All income is recognised in the Statement of Financial Activities once the charity is in receipt of the funds.

c. Expenditure

All expenditure is recognised in the Statement of Financial Activities once the payment has been made from the charity.

2. Donations Received

	2025 £	2024 £
Donations received - Unrestricted	68,964	10,000
	£68,964	£10,000

BRIESS FAMILY CHARITABLE TRUSTS

NOTES TO THE ACCOUNTS (Cont'd)

31 JANUARY 2025

3. Investment Income

	2025 £	2024 £
Interest received	2,383	722
Dividend income	3,440	3,548
	£5,823	£4,270

4. Resources Expended

	2025 £	2024 £
Costs of charitable activities		
Donations	104,248	85,725
Trustees expenses	841	1,278
Bank charges	89	84
Investment fees	370	411
	£105,548	£87,498
Costs of governance		
Accountancy	1,620	3,728
	£1,620	£3,728
Total Resources Expended	£107,168	£91,226

BRIESS FAMILY CHARITABLE TRUST

England & Wales - Charity number 272721

Accounts

Trustees' Annual Report for the period

	Period start date				Period end date		
From	01	02	2023	To	31	01	2024

Section A Reference and administration details

Charity name Briess Family Charitable Trust

Other names charity is known by

Registered charity number (if any) 272721

Charity's principal address

12 Cenacle Close
London

Postcode NW3 7UE

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	P Briess	Chairman		
2	B Kohner			
3	D Briess			
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Deed dated 27 November 1976 amended on 14 August 2018 and 28 April 2022
How the charity is constituted (eg. trust, association, company)	Trust
Trustee selection methods (eg. appointed by, elected by)	Elected by existing trustees

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

The trustees have assessed the risks that the trust is exposed to and are satisfied that the controls in place adequately cover the risks.

The trustees have sufficient experience and knowledge to carry out their duties as trustees.

Section C Objectives and activities

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

The Briess Family Charitable Trust is an independent grant-making family-run trust and makes donations to registered charities at the discretion of the trustees.

To support such charities or for such charitable purposes as permitted by the trust deed subject to the discretion of the trustees.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The trustees undertake to identify and support organisations that further the following causes:

1) Refugee relief.
2) Educational and training schemes.
3) Holocaust memorialisation and education.
4) Environmental and wildlife conservation.
5) Medical and scientific research.

In providing financial support, the trustees are always mindful that this will benefit the wider public.

Additional details of objectives and activities (Optional information)

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

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

The trustees do not consider unsolicited applications for funding.

The trustees will approach potential partners that operate in the areas that the trust seeks to support. Where funding is provided, the trustees seek to offer long term assistance.

Summary of the main achievements of the charity during the year

The trust made a significant financial contribution of £30,000 to Rotherham Doncaster and South Humber NHS Foundation Trust to enable research into mental health treatments.

The trustees also provided £20,000 to UJIA for the provision of student accommodation in the northern Israeli city of Acre.

In making these and other donations, the trustees have complied with section 17(5) of the Charities Act 2011 to ensure that financial support is for the benefit of the public.

Section E Financial review

Brief statement of the charity's policy on reserves	The trustees seek to maintain a level of reserves that will enable them to provide continuing financial support for the duration of projects that they have committed to assist.
Details of any funds materially in deficit	

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Section F Other optional information

Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Peter Briess	David Briess
Position (eg Secretary, Chair, etc)	Trustee	Trustee

Date 05/06/2024

CHARITY COMMISSION FOR ENGLAND AND WALES

Briess Family Charitable Trust	No (if any) 272721

Receipts and payments accounts

CC16a

For the period from	Period start date 01/02/2023	To	Period end date 31/01/2024

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations received	10,000	-	-	10,000	-
Dividends received	3,548	-	-	3,548	3,957
Interest received	722	-	-	722	85
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total *(Gross income for AR)*	14,270	-	-	14,270	4,042
A2 Asset and investment sales, (see table).					
Sale of investments	61,621	-	-	61,621	36,018
	-	-	-	-	-
Sub total	61,621	-	-	61,621	36,018
Total receipts	75,891	-	-	75,891	40,060
A3 Payments					
Donations paid	85,725	-	-	85,725	67,256
Trustee expenses reimbursed	1,278	-	-	1,278	-
Investment manager fee	411	-	-	411	558
Bank charges	84	-	-	84	81
Accountancy	3,728	-	-	3,728	4,590
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	91,226	-	-	91,226	72,485
A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	91,226	-	-	91,226	72,485
Net of receipts/(payments)	- 15,335	-	-	- 15,335	- 32,425
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	46,622	-	-	46,622	79,047
Cash funds this year end	31,287	-	-	31,287	46,622

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	CAF Bank account	24,428	-	-
	EQ Cash fund	6,859	-	-
		-	-	-
	Total cash funds	31,287	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

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

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	EQ Portfolio	Unrestricted	-	253,098
			-	-
			-	-
			-	-
			-	-

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

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval
		Dr D Briess	23/05/2024
		P Briess	23/05/2024

BRIESS FAMILY CHARITABLE TRUST

England & Wales - Charity number 272721

Accounts

BRIESS FAMILY CHARITABLE TRUST

Reg. No. 272721

ANNUAL ACCOUNTS FOR THE YEAR ENDING 31ST JANUARY 2021 (£)

	Expenses	Income	
Opening Balance Bank Account 01.02.20			**2,491.92**
Transferred into BFCT – P.Briess		40,000.00	
Admin Charge -MM	420.00		
Bank Charges paid out	78.37		
Total Distribution for Year to 31/1/21 (Details of donations in file)	4,775.00		
Total	**5,273.37**	**40,000.00**	
Movement on Bank Account:			
Transferred into bank account from Investments (BFCT EQ)		4,000.00	
Transferred from Bank A/c to BFCT EQ Investments A/C	40,000.00		
Total after Transfers	**45,273.37**	**44,000.00**	
Closing Balance Bank Account 31.01.21			**1,218.55**

Note to the Accounts: Securities and cash held on BFCT investment account as at 31/12/20 £392,291.59

Signed .....

P. Briess Trustee

Date 4/10/21

12, Cenacle Close, London NW3 7UE

Briess Family Charitable Trust

Report on Distributions February 2020-January 2021

21st November 2021

Due to the pandemic our activities were curtailed in the year.

The major distribution was to the Tel Aviv University Trust for the sum of £2000.

Further distributions were made to The British Heart Foundation, Royal Institution, Royal Academy of Music, Salvation Army, British Legion and a number of other charities.

Finally, the balance in the investment account at EQ, as at 31st December 2020, was £392,291. It is being held in reserve for future capital requirements which are constantly under review.

Peter Briess

Trustee Briess Family Charitable Trust

Briess Family Charitable Trust- Donations February 2020- January 2021								
			Regular Annual donation	Donation to mark an Occasion	Sponsorship of Individual e.g Marathon	Part of the Otto Pick Funding	Scholarship / Training support	Other
chq 699	JNF-Lisa Eckstein	255.00		255.00				
chq 700	JMI	620.00	620.00					
chq 701	Tel Aviv University Trust	2,000.00				2,000.00		
chq 702	JNF- Stephen Haig	250.00		250.00				
chq 703	Kingston Surbiton & District Synagogue	250.00				250.00		
chq 704	British Heart Foundation- Tony Foster	200.00		200.00				
chq 705	AJR	200.00	200.00					
chq 706	Royal Institution	250.00						250.00
chq 710	Mahler Society- Norman Debrecht	50.00		50.00				
chq 711	Royal academy of Music	200.00	200.00					
chq 712	Royal British Legion	200.00	200.00					
chq 714	Salvation Army	300.00	300.00					
	TOTAL	4,775.00	1,520.00	755.00	0.00	2,250.00	0.00	250.00