

THE RICHARD WHITTINGTON LODGE BENEVOLENT FUND

England & Wales · Charity number 274143

Details

| | |
|-------------|---|
| Other names | Richard Whittington Lodge Members Charity |
| Status | Registered |
| Legal form | Trust |
| Registered | 1977-08-19 |
| Register | View on the Charity Commission register |

Contact

Address 1 Rosemary Close
Abbeydale
Gloucester
GL4 5TL

Phone 01452309010

Email cjhill@btinternet.com

Activities

Objects: TO OR FOR THE RELIEF OF SUCH POOR AND DISTRESSED BROTHER MASONS AND THEIR POOR AND DISTRESSED WIDOWS AND CHILDREN OR TO OR FOR THE BENEFIT OF SUCH MASONIC CHARITIES OR OTHER CHARITABLE INSTITUTIONS, SOCIETIES AND OBJECTS AS THE LODGE SHALL DIRECT.

Activities: The Trustees meet as required to consider and grant or deny requests for donations forwarded by members of the Lodge or direct by individuals or groups

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations
- **What:** General Charitable Purposes
- **Who:** Elderly/old People, Other Charities Or Voluntary Bodies, Other Defined Groups

Geography

- Gloucestershire

Finances

| Period end | Income | Expenditure | Assets | Employees |
|------------|---------|-------------|--------|-----------|
| 2025-12-31 | £14,585 | £10,000 | - | - |
| 2024-12-31 | £34,120 | £10,310 | - | - |
| 2023-12-31 | £24,143 | £855 | - | - |
| 2022-12-31 | £0 | £5,800 | - | - |
| 2021-12-31 | £1,075 | £155 | - | - |
| 2020-12-31 | £25,033 | £155 | - | - |

Trustees

| Name | Role | Appointed |
|-------------------------------|-------|------------|
| CHRIS topher John HILL | Chair | 2011-07-04 |
| Malcolm John White | | 2019-03-15 |
| Neil Hendry | | 2022-03-18 |
| Richard Henry Chatham | | 2019-03-15 |
| Robert Paul Panou | | 2013-10-18 |

THE RICHARD WHITTINGTON LODGE BENEVOLENT FUND

England & Wales - Charity number 274143

Accounts

The Richard Whittington Members Charity has a good year with their Endowment exceeding its recovery plan such that the trustees agreed that £10,500 could be donated to Charity in the coming year

RICHARD WHITTINGTON LODGE No 7534 Benevolent Fund Charity N0 274143

STATEMENT OF ACCOUNTS FOR THE YEAR ENDED

31st DECEMBER 2024

The Charity consists of 2 main elements: Firstly, the original (A and B):

A1: Richard Whittington Lodge Benevolent Fund

This fund's income is derived from ALMS collection at Lodge meetings

| | | | |
|-----------------|--------|-------------------------------|--------|
| Opening Balance | £3,853 | Expenses Fundfiler | £75 |
| ALMS WM | £265 | Donations made Masonic Widows | £100 |
| | | Provincial Raffle | £100 |
| | | AGM Refreshments | £35 |
| | | Closing Balance: | £3,808 |
| | £4,118 | | £4,118 |

A2 Members funds with Mercers Hall

| | | | |
|--------------------------|------|-----------------|------|
| lodged with Mercers Hall | £100 | | |
| Include interest | £2 | | |
| | | Closing Balance | £102 |
| | £102 | | £102 |

B: UGLE Relief Chest L7534

Fund income is derived from Lodge members who pay a monthly Direct Debit contribution

| | | | |
|-------------------------------|---------|------------------------------------|---------|
| Opening Balance | £8480 | Transferred to Gloucester Festival | £10,000 |
| Interest | £402 | Closing Balance | £1,845 |
| Donations Received + Gift Aid | £2963 | | |
| | £11,845 | | £11,845 |

Secondly, the Charles Walker Bequest, left 'in perpetuity' to the Lodge (C)

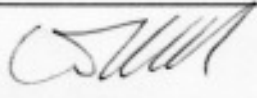
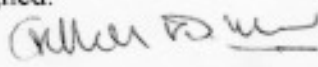
The bulk of the bequest, now invested so that it grows back to its 'in perpetuity' value

C: SARASIN Investment Funds Limited - Charles Walker Bequest - RWL CWB

| | | | |
|-------------------|----------|-----------------|----------|
| Opening Balance | £257,794 | | |
| Increase in Value | £30,755 | Closing Balance | £288,549 |
| | £288,549 | | £288,549 |

Endowment fund being rebuilt to original figure plus RPI = £229,250 at 31/12/24. current £288,549

Total Gain during year £30,755.

| | |
|---|--|
| Signed:  | Signed:  |
| Colin Kell (Senior Warden) | Graham Ireland (Junior Warden) |
| Date: 19/03/2025 | Date: |


CJ HILL Treasurer

RICHARD WHITTINGTON LODGE No 7534 Benevolent Fund Charity N0 274143

STATEMENT OF ACCOUNTS FOR THE YEAR ENDED

31st DECEMBER 2024

The Charity consists of 2 main elements: Firstly, the original (A and B):

A1: Richard Whittington Lodge Benevolent Fund

This fund's income is derived from ALMS collection at Lodge meetings

| | | | |
|-----------------|--------|-------------------------------|--------|
| Opening Balance | £3,853 | Expenses Fundfiler | £75 |
| ALMS WM | £265 | Donations made Masonic Widows | £100 |
| | | Provincial Raffle | £100 |
| | | AGM Refreshments | £35 |
| | | Closing Balance: | £3,808 |
| | £4,118 | | £4,118 |

A2 Members funds with Mercers Hall

| | | | |
|--------------------------|------|-----------------|------|
| lodged with Mercers Hall | £100 | | |
| Include interest | £2 | | |
| | | Closing Balance | £102 |
| | £102 | | £102 |

B: UGLE Relief Chest L7534

Fund income is derived from Lodge members who pay a monthly Direct Debit contribution

| | | | |
|-------------------------------|---------|------------------------------------|---------|
| Opening Balance | £8480 | Transferred to Gloucester Festival | £10,000 |
| Interest | £402 | Closing Balance | £1,845 |
| Donations Received + Gift Aid | £2963 | | |
| | £11,845 | | £11,845 |

Secondly, the Charles Walker Bequest, left 'in perpetuity' to the Lodge (C)

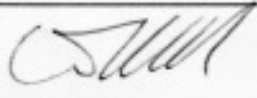
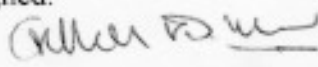
The bulk of the bequest, now invested so that it grows back to its 'in perpetuity' value

C: SARASIN Investment Funds Limited - Charles Walker Bequest - RWL CWB

| | | | |
|-------------------|----------|-----------------|----------|
| Opening Balance | £257,794 | | |
| Increase in Value | £30,755 | Closing Balance | £288,549 |
| | £288,549 | | £288,549 |

Endowment fund being rebuilt to original figure plus RPI = £229,250 at 31/12/24. current £288,549

Total Gain during year £30,755.

| | |
|---|--|
| Signed:  | Signed:  |
| Colin Kell (Senior Warden) | Graham Ireland (Junior Warden) |
| Date: 19/03/2025 | Date: |


CJ HILL Treasurer

THE RICHARD WHITTINGTON LODGE BENEVOLENT FUND

England & Wales - Charity number 274143

Accounts

The Richard Whittington Benevolent Fund Charity No 274143

Extra Ordinary General Meeting held on 13th September 2021 at 6pm

Present: Ted Le Baigue (Founder Trustee), Jim Sharrock, Mike Jordan, Richard Chatham Matthew Mankinson, Dick Barton, Chris Hill (Chairman), Robert Panou (Secretary), Neil Hendry

Apologies were received from :- Rod Owens, Howard Williams, David Michael, Malcolm White, Duncan Lord, Jim Lancaster, Jon Miles, Colin Kell, Russell Dyer

1. Consideration of the Trust Deed...

The Chairman provide an overview of the Trust Deed, which had been sent to all members for consideration some months ago following professional preparation, and no questions had been raised. There were no questions from the floor. The Deed approved by those present. Four absentee members David Michael, Jim Lancaster, Malcom White and Duncan Lord were also in favour and the Chairman declared that the New Trust Deed was approved

2. Approval of Accounts...

The presented the consolidated audited accounts. The members expressed their satisfaction for the financial position and investment proposals. All present approved the accounts with absentee votes in favour provided by David Michael, Jim Lancaster, Malcom White and Duncan Lord.

3. Confirmation of Trustees

The Chairman said that there were 3 further nominations as trustees; namely Robert Panou as Secretary, and Malcom White and Richard Chatham All present approved that the proposed Trustees with absentee votes provided by David Michael, Jim Lancaster, Malcom White and Duncan Lord.

4. Date of next AGM

The Chairman explained that with the financial year ending on 31st December the earliest date at which the next AGM would be early March. It was proposed for the 18th March 2022. All present agreed.

R P Panou
Secretary

Confirmed
C J Hill

Chairman