

## **ANTHROPOSOPHICAL MEDICAL TRUST**

Charity Registration no. 283052

Annual report of the trustees  
for the period 1<sup>ST</sup> October 2022 – 30<sup>th</sup> September 2023

The Anthroposophical Medical Trust was founded as a charitable trust on 12<sup>th</sup> June 1981 and called the Talander Trust. A deed of variation changing the name to the Anthroposophical Medical Trust took place 28<sup>th</sup> July 1989 and a minor deed changing the number of trustees occurred 15<sup>th</sup> June 2002.

**Charity address:** 28 Old Hospital Lawn, Stroud, GL5 4GA.

### **The charity trustees in the period:**

Rainer Klocke – retired 01/08/2023

Michael Luxford - appointed 2016

Piet Blok - appointed 2016

Sibylle Eichstaedt – appointed 01/11/2021 Chair

Ian Bailey – appointed 11/11/2022 Treasurer

Further trustees with appropriate understanding of the anthroposophical medical approach and relevant skills will be appointed in accordance with the rules of the Charity.

### **Objects:**

The objects of the Trust are:-

1. Assisting the provision of Anthroposophical Medicine without charge to whoever requires it on a basis of need regardless of financial circumstances, age, sex, race, creed, nationality, or domicile from funds freely donated for this purpose.
2. To publish periodic statements on the concerns of Anthroposophical medicine.
3. To encourage its beneficiaries to engage in regular joint consultation regarding the priority of their respective applications.
4. To focus on supporting annual running costs of beneficiaries rather than capital projects.
5. The charity should avoid ownership of land or buildings.

### **Review of activities during the period:**

A serious incident report was made to the Charity Commission in December 2022 concerning the lack of co-operation in charity affairs of the previous chairperson.

Unfortunately, a consequence of this breakdown and inactivity was that access to one of the trust's bank accounts was lost and as a result it has not been possible to complete full financial reports from October 2019 onward. Access to this NatWest bank account has only just been achieved at the time of writing (May 2024) and full management accounts for the missing years have now been completed.

However, very little activity occurred with only small standing order donations coming in and minor administrative expenses being paid through the operative bank account (Unity Bank)

Discussions about how to take the Trust forward and formulate a *modus operandi* occupied the trustees during the year. A retreat was planned for July 2023. A breadth of individuals involved in the foundation of Talander and representing medical initiatives in the country were invited and the question of recalling our aims and objectives, setting up new guiding principles, the relationship of AMT with the Anthroposophical Medical Section, re-introducing the Trust to the wider medical community, and suggestions for new trustees were all planned for consideration.

This retreat was finally held in November 2023, beyond the period of this annual report and at its conclusion there was a ceremony of rededicating the Trust.

One of the trust's bank accounts was designated to handle monies coming and going to the Medical Section of GB. The finances of a number of Zoom talks and the annual Medical Section Conference were managed in this way and funds previously held in the care of other organisations were transferred into the account. This facility of banking for the Medical Section is to be considered an activity of the AMT and expressive of the mutuality of these two bodies.

### **Achievements:**

The achievements have been :-

- ✚ wresting control of the charity from the inactive Chairperson and appointing new trustees with a plan to re-invigorate the trust,
- ✚ planning the retreat to establish a new *modus operandi*,
- ✚ setting up management accounts based on Excel spreadsheets.

Our charitable purpose is to facilitate the provision of Anthroposophical Medicine without charge to whoever requires it on a basis of need. We encourage beneficiaries to engage in regular joint consultation regarding the priority of their respective applications in order to achieve the greater aim of helping to make Anthroposophical Medicine more widely accessible to members of the public. In so doing we have given due regard to the commission's public benefit guidance when exercising any powers or duties.

### **Future plans:**

The retreat upon which much hope for revitalization of the Trust was pinned unfortunately had to be postponed due to ill health. So, this retreat and the rebirth of the Trust are carried forward into the year 2023- 2024 as the focus of our future plans. Once this groundwork is completed, we would hope to be in a position to form associative relationships within the Anthroposophical medical community and begin the work of supportively financing projects directed towards our Objects and generating a flow of donations to sustain the activity of the trust. To this end a clear approach to fundraising and grant making will be needed. Trustees will be drawing up policy and procedure accordingly.

**Finances:**

Due to a lack of access to the trust's NatWest bank accounts full financial reporting has only been achieved since the year end, but there has been no financial activity other than regular donation income and bank interest in those accounts due to this lack of access.

The Unity Bank accounts represent the only financial expenditure activity, and they are reported on using bank statements covering the period.

The really significant financial event of the period was the receiving of a legacy payment endowed to the Trust. Two payments were received in the year, the first in February 2022 of £250,000 and the second in July 2023 of £20,000.

Full management accounts have been drawn up for the period October 2022 to 30<sup>th</sup> September 2023 using bank statements we have now gained access to.

**Reserves & Investment:**

A reserves policy is uncalled for in terms of our revenue as there are no significant management outgoings requiring a reserves policy as yet. There are no restricted funds. Donations are placed in an interest-bearing Deposit Account. In the light of a significant legacy received the trustees will be considering the possibility of a relevant and ethical investment in line with Charity Commission guidance on investment.

**Ethos, strategy and policies:**

As the trust recovers from this breakdown in its operation trustees will be meeting in a retreat to re-establish the ethos of the Charity and engaging new trustees to develop strategies for moving forward and successfully fulfilling the Objects of the Charity with the funds available to it.

**Charity executive:**

The Anthroposophical Medical Trust has no paid executive at this time.

**Contact details:**

**Banks:**


NatWest:

Unity Bank:

**Independent examiners**

BK Plus

**Project Advisors:**

-  Anthroposophical Society in Great Britain:
-  Medical Section of the ASinGB
-  Friends and founders of the original Talander impulse
-  Anthroposophic Health & Social Care Movement

Report compiled by:

Ian Bailey

Treasurer 26<sup>th</sup> May 2024



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Anthroposophical Medical Trust

283052

## Receipts and payments accounts

CC16a

For the period  
from

01/01/2023

To

31/12/2023

### 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 £
<b>A1 Receipts</b>					
Donations	1,319	-	-	1,319	70,752
Legacy income	269,958	-	-	269,958	-
Bank interest	5,894	-	-	5,894	83
Medical section activity	12,700	-	-	12,700	-
<b>Sub total (Gross income for AR)</b>	<b>289,871</b>	<b>-</b>	<b>-</b>	<b>289,871</b>	<b>70,835</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>289,871</b>	<b>-</b>	<b>-</b>	<b>289,871</b>	<b>70,835</b>
<b>A3 Payments</b>					
Project support given	200	-	-	200	-
Office admin and insurance	372	-	-	372	96
Governance - audit fees	4,056	-	-	4,056	-
Bank charges	87	-	-	87	144
Medical section costs	6,779	-	-	6,779	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>11,494</b>	<b>-</b>	<b>-</b>	<b>11,494</b>	<b>240</b>
<b>A4 Asset and investment purchases. (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>11,494</b>	<b>-</b>	<b>-</b>	<b>11,494</b>	<b>240</b>
<b>Net of receipts/(payments)</b>	<b>278,377</b>	<b>-</b>	<b>-</b>	<b>278,377</b>	<b>70,595</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>145,058</b>	<b>-</b>	<b>-</b>	<b>145,058</b>	<b>74,463</b>
<b>Cash funds this year end</b>	<b>423,435</b>	<b>-</b>	<b>-</b>	<b>423,435</b>	<b>145,058</b>

## 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 £
<b>B1 Cash funds</b>	Cash at bank	423,435	-	-
			-	-
			-	-
	<b>Total cash funds</b>	423,435	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>			Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>		Unrestricted Fund	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>		Unrestricted Fund	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
	Ian Bailey	IAN BAILEY	22/07/24	



**Section A**

**Independent Examiner's Report**

**Report to the trustees/  
members of**

Anthroposophical Medical Trust

**On accounts for the year  
ended**

30 September 2023

**Charity no  
(if any)**

283052

**Set out on pages**

1 and 2

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **30/09/2023**.

**Responsibilities and  
basis of report**

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 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent  
examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below \*) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which 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:**

23 July 2024

**Name:**

Cinzia Hensley

**Relevant professional  
qualification(s) or body  
(if any):**

FCA FCCA

**Address:**

BK Plus Limited

6 Manor Park Business Centre, Mackenzie Way, Cheltenham

GL51 9TX

**Section B**

**Disclosure**

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

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



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Anthroposophical Medical Trust

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from

01/10/2022

To

30/09/2023

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	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
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	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>11,494</b>	<b>-</b>	<b>-</b>	<b>11,494</b>	<b>240</b>
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	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>11,494</b>	<b>-</b>	<b>-</b>	<b>11,494</b>	<b>240</b>
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	(agree balances with receipts and payments account(s))			

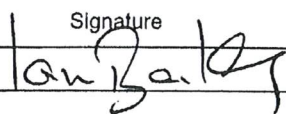
	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Unrestricted	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Unrestricted Fund	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Unrestricted Fund	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Ian Bailey	23/07/2024