



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1 July 2023 Period start date To 30 June 2024 Period end date

Charity name: The Suzy Trust

Charity registration number: 283229

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The relief of refugees and the poor of all nations
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	To raise funds and to distribute them to charities and individuals working to relieve suffering and starvation
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have had regard to the guidance issued by the Charity Commission on public benefit in pursuance of their activities

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	n/a
Policy on social investment including program related investment	Para 1.38	n/a
Contribution made by volunteers	Para 1.38	n/a
Other		n/a

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 1.20	<p>During the 12 months to 30th June 2024 the Suzy Trust donated £33,720 to the following charities:</p> <p>Concern £600 – Concern Worldwide is Ireland's largest aid and humanitarian agency. Founded over 50 years ago it has worked in 50 countries</p> <p>Ethiopiaid: £9,000 – a UK registered charity that generates public funding for local charity partners in Ethiopia to relieve famine and poverty</p> <p>Water Aid: £120 – operates in 34 countries worldwide. Working to transform millions of lives every year by improving access to clean water, toilets and hygiene</p> <p>Mary's Meals: £6,000 – supplying a meal everyday to over a million school children across the poorer areas of the world</p> <p>CAFOD £1,000 - the official aid agency for the Catholic Church in England and Wales reaching out to people living in hard-to-reach places, in war zones and those who are discriminated against</p> <p>Sister Rose Carmel: £3,000 – working to alleviate poverty in Bucharest</p> <p>Light for the Blind: £3,000 – hospices for the destitute in India</p> <p>Network for a Better World £9,000 - Prevention & relief of poverty in remote, marginalised areas of the world (especially rural Malawi) with specific support for women and children</p> <p>Cap Care £2,000 – Helping the disadvantaged in Wakefield and to raise the awareness of the general public</p>

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	n/a
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Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The charity has surplus funds following a large legacy received in the year. Trustees are giving ongoing consideration as to how to distribute these funds.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	To hold no overdraft or borrowings or costs, to maintain a min. £3,000 balance surplus for urgent appeals
Amount of reserves held	Para 1.22	£43,784
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	None, n/a

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Trust Deed
How is the charity constituted? (e.g. unincorporated association, CIO)	Para 1.25	Trust Deed
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	Appointed in AGM

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	n/a
The charity's organisational structure and any wider network with which the charity works	Para 1.51	n/a
Relationship with any related parties	Para 1.51	None
Other		n/a

Reference and Administrative details

Charity name	The Suzy Trust
Other name the charity uses	Saint Peter's and Saint Paul's Suzy Fund
Registered charity number	283229
Charity's principal address	1 Chevet Mews, Sandal, Wakefield, WF2 6AG

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	Christian Hazell			
2	Jan Szczepanski			
3	Ron Mulroy		1/7/23 to 31/5/23	
4	Satya Mehta			
5	Terry Walsh			
6	Monica Haley			
7	Marriane Magdy Haworth			
8	Ciara Ellen Metcalfe			
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Corporate trustees – names of the directors at the date the report was approved

Director name		
n/a		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
n/a		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	n/a
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
n/a		

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

n/a

Exemptions from disclosure

Reason for non-disclosure of key personnel details

n/a

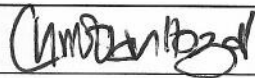
Other optional information

n/a

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)	Christian Hazell	
Position (eg Secretary, Chair, etc)	Chair	
Date	17 October 2024	

THE SUZY TRUST
REGISTERED NUMBER 283229
12 MONTHS ENDED 30 June 2024

RECEIPTS & PAYMENTS ACCOUNT for Year Ended 30 June 2024

RECEIPTS	£	PAYMENTS	£
Donations, collections & other fundraising (2023: £11,360)	10,284	Donations (2023: £17,720)	33,720
Legacy	55,000		
Bank interest	-	Bank Charges	-
HMRC Gift Aid (Donations) (2020: £4,728)	1,884	Printing	-
Accumulated balance @ 1.7.23	10,336	Accumulated balance @ 30.06.24	43,784
	<u>77,504</u>		<u>77,504</u>

BALANCE SHEET at 30 June 2024

ASSETS & LIABILITIES

Cash at bank	<u>43,784</u>	Accumulated balance I & E Account	<u>43,784</u>
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Summary list of donations (payments):	£
Concern Worldwide	600
Ethiopiaid	9,000
Wateraid	120
Marys Meals	6,000
Sr Rose Carmel	3,000
Cafod	1,000
Light for the Blind	3,000
Wakefield CAP	2,000
Network for a Better World	9,000
	<u>33,720</u>



Section A

Independent Examiner's Report

Report to the trustees

Charity Name
The Suzy Trust

On accounts for the year
ended

30 June 2024

Charity no
(if any) 283229

Set out on pages

1-2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **30 / 06 / 2024**.

Responsibilities and
basis of report

As the charity's trustees, 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 all 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 in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did 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.

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

Signed:

Date: 24 April 2025

Name:

Steven John Worrall

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

FMAAT

Address:

24 Links Way, Drighlington,

Bradford

BD11 1LE

Section B

Disclosure

Only complete if the examiner needs to highlight material 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.

NONE.