

# THE K B AND V M JONES CHARITABLE TRUST

England & Wales · Charity number 294579

## Details

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**Status** Registered

**Legal form** Trust

**Registered** 1986-06-26

**Register** [View on the Charity Commission register](#)

## Contact

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**Address** 7 Broughton Road  
Ipswich  
IP1 3QR

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## Activities

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**Objects:** FOR SUCH PURPOSE OR PURPOSES AS SHALL BE EXCLUSIVELY CHARITABLE ACCORDING TO THE LAW OF ENGLAND AND WALES.

**Activities:** General support of other charities, causes and persons in need.General Charitable Purposes

## Classification

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- **How:** Makes Grants To Individuals, Makes Grants To Organisations
- **What:** General Charitable Purposes, Religious Activities, Arts/culture/heritage/science, Environment/conservation/heritage
- **Who:** Children/young People, Elderly/old People, People With Disabilities, People Of A Particular Ethnic Or Racial Origin, Other Charities Or Voluntary Bodies, The General Public/mankind

## Geography

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- Throughout England And Wales

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£3,745	£10,094	-	-
2024-03-31	£63,285	£51,289	-	-
2023-03-31	£835	£1,205	-	-
2022-03-31	£750	£554	-	-
2021-03-31	£645	£819	-	-

## Trustees

Name	Role	Appointed
<b>VERY REVEREND KEITH JONES MA</b>	Chair	
Isabel Sarah Wright		2023-04-24
VIOLA MARY JONES		

**THE K B AND V M JONES CHARITABLE TRUST**

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# Accounts

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## **THE KB AND VM JONES CHARITABLE TRUST 294579**

### **Report on activities for the year 2023-4**

The charity was established on the 6<sup>th</sup> May 1986 and has three trustees, who serve for an indeterminate period.

These are currently The Very Reverend Keith Jones, Mrs Viola Jones, trustees since the inception, and Mrs Isabel Wright (appointed 16<sup>th</sup> November 2023), taking the place of The Rev Nicholas Elder.

The Trustees have been in regular contact with each other, and have approved all the disbursements made during the year. The Trustees hold a meeting at the end of each year to confirm the activities of the Trust in accordance with the purposes set out in the founding document. Appointment of a new trustee was made with unanimous approval of the trustees at the time. During the year a revision of the Founding Document was made to record the change of trustee.

The Trustees receive no financial benefit from the Trust, save incidental expenses for the running of the Trust which may be incurred and claimed. The Trust has made disbursements in accordance with its founding deed, and has assisted individuals who are in need, applicants who are seeking help at important moments in their lives, to other organisations, including charities (especially local ones) serving the community which includes to the fabric of church buildings.

The Charity does not advertise its existence, but has received applications from people who have consulted the Charity Commission website, or have heard of us by word of mouth.

The Trustees agreed on August 5<sup>th</sup> 2024 to ask Lorna Adamson to be our external examiner for our accounts for the year 2023-4.

Keith Jones

Trustee and signatory on behalf of the Trustees



## Receipts and payments accounts

**CC16a**

<b>For the period from</b>	Period start date April 1st 2023	<b>To</b>	Period end date 31st March 2024
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### 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>					
Dividends	1,285	-	-	1,285	835
Donation	60,000	-	-	60,000	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b> (Gross income for AR)	<b>61,285</b>	<b>-</b>	<b>-</b>	<b>61,285</b>	<b>835</b>
<b>A2 Asset and investment sales, (see table).</b>					
Sale of investments	2,000	-	-	2,000	-
	-	-	-	-	-
<b>Sub total</b>	<b>2,000</b>	<b>-</b>	<b>-</b>	<b>2,000</b>	<b>-</b>
<b>Total receipts</b>	<b>63,285</b>	<b>-</b>	<b>-</b>	<b>63,285</b>	<b>835</b>
<b>A3 Payments</b>					
Grants to Institutions	4,104	-	-	4,104	1,205
Grants to individuals	1,785	-	-	1,785	-
Legal fees for governance purposes	400	-	-	400	-
	-	-	-	-	-

	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>6,289</b>	<b>-</b>	<b>-</b>	<b>6,289</b>	<b>1,205</b>
<b>A4 Asset and investment purchases, (see table)</b>					
Purchase of Investments	45,000	-	-	45,000	-
	-	-	-	-	-
<b>Sub total</b>	<b>45,000</b>	<b>-</b>	<b>-</b>	<b>45,000</b>	<b>-</b>
<b>Total payments</b>	<b>51,289</b>	<b>-</b>	<b>-</b>	<b>51,289</b>	<b>1,205</b>
<b>Net of receipts/(payments)</b>	<b>11,996</b>	<b>-</b>	<b>-</b>	<b>11,996</b>	<b>-</b>
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	179	-	-	179	-
<b>Cash funds this year end</b>	<b>12,175</b>	<b>-</b>	<b>-</b>	<b>12,175</b>	<b>-</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>	Current Account	12,175	-	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	<b>12,175</b>	<b>-</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK
		<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>Endowment funds</b>

<b>B2 Other monetary assets</b>	Details	to nearest £	to nearest £	to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

<b>B3 Investment assets</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	Janus Henderson UK Alpha Fund Acc	<b>Unrestricted funds £18108</b>	-	<b>18,108</b>
	M&G Equities Fund for Charities	Unrestricted funds £62872	-	<b>62,872</b>
			-	-
			-	-
			-	-

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

**B5 Liabilities**

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

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

Signature	Print Name	Date of approval
Keith Jones	Keith Jones	26/11/24
Viola Jones	Viola Jones	<b>26/11/24</b>

**Report to the Trustees of the KB and VM Jones Charitable Trust  
On the accounts for the year ended 31<sup>st</sup> March 2024  
Charity Number 294579**

2<sup>nd</sup> December 2024

I report to the trustees on my examination of the accounts of the KB and VM Jones Charitable Trust (the Trust) for the year ended 31<sup>st</sup> March 2024.

**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 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 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.

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.

*Lorna M. Adamson*

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