



**The North & East Yorkshire Mark Benevolent Fund**

**Registered Charity N° 517013**

Established by Declaration of Trust, 1<sup>st</sup> July 1985

**Annual Report of the Trustees for the Year ending 5<sup>th</sup> April 2024**

**Trustees**

David Robert Clancey, Allan Cameron Scott, Paul David Barham & John White.

The Fund is managed by the Charity Committee comprising the appointed Charity Stewards of all Lodges under the Provincial Grand Mark Lodge, the immediate past Chairman of the Committee and the Provincial Grand Master, the Deputy Provincial Grand Master, the Assistant Provincial Grand Master and the Provincial Grand Charity Steward (who acts as Treasurer of the Fund and Secretary of the Committee).

The Charity Committee appoints the Trustees of the Fund who shall serve for 10 years or until age 75. The Chairman of the Committee is elected for a 1 year term by the Charity Committee.

All Trustees and Committee members give their time voluntarily and receive no remuneration or other benefits.

The Objects of the Fund are the relief of poor and distressed Brother Masons or their poor and distressed widows and other relatives, or the benefit of such Masonic Charities or other Charitable Institutions, Societies and charitable objects as the Charity Committee shall in duly constituted meeting direct.

The Fund's income is derived from donations made by individual Lodge members and from Lodge funds. In the year in question the total income was £26,473 including Gift Aid tax reclaimed on individual donations.

Where desired by the donor, individual donations may be accumulated and passed on the Grand Mark Fund of Benevolence (GMBF) when the donor has reached qualifying levels of donation to achieve patronage status.

In line with the duty to act for the public benefit within the constraints laid down in the Governing Document, the Fund invites all Lodges within the Province to put forward to the Charity Committee, through their Charity Stewards, those non-masonic charitable organisations which they believe would benefit from grants. To be eligible the organisation must be registered with the Charity Commission and operate solely in the geographic area of the province or demonstrate that any grants would be ring fenced and applied only within the province.

The Committee have adopted a policy that 5 larger Charities would be chosen to be beneficiaries for a 5 year period, each receiving a grant determined by the Committee once every 6 months within the 5 year period. Additionally, every 6 months the Committee determines which of the other organisations put forward by the Lodges or Committee members should receive a grant, bearing in mind the level of available funds.

In the year ending 5<sup>th</sup> April 2024 grants were made to

GMBF (patronage payments) [000]	£4,075
GMBF (Lincolnshire Festival Jewels) [000]	£500

#### Grants to Non-Masonic Charities:

##### 5 Year Beneficiaries:

We can Dance	£1,000
Her Breast Friend	£1,000
RABI	£1,000
Littlefoot Trust	£500
Stape Silver Band	£500

These payments were the first to be made under the current 5-year programme.

##### 6 Month Awards

Action Medical Relief	£250
Trac UK	£300
The Grenfell Club	£500
Redcar Development Trust	£500
Bedale Scout Group	£500
Tees Valley Together.	£500
Ryedale Special Families	£1,000
Hull Sea Cadets	£500

Total Expenditure	£22,803
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As a result of these activities the Accumulated Fund increased by £12,533.11 to £66,591.08, of which £35,455.38 is held in deposit accounts.

The Fund has a Reserve Policy agreed by the Committee on 20<sup>th</sup> October 2014 that £35,000 should be held in Reserve Accounts to cover future liabilities that may arise through patronage funding or emergency disaster funding.

The Trustees would like to place on record their appreciation of the hard work done by the Lodge Charity Stewards and to all the Lodge members for their generosity.

The Trustees declare that they have approved this Trustee Report.

Signed on behalf of the Charity's Trustees

Lee Barry Richardson

Provincial Grand Charity Steward, Secretary  
Date 23<sup>rd</sup> November 2024

**THE NORTH AND EAST YORKSHIRE  
MARK BENEVOLENT FUND**  
(Registered Charity 517013)  
**Charitable Sources Unrestricted Funds**

<b>INCOME AND EXPENDITURE ACCOUNT YEAR ENDED 5th APRIL 2024</b>	<b>2024 £</b>	<b>2023 £</b>
<b>INCOME</b>		
Mark Lodges	22,305	13,854
Bank Interest	286	93
Festival Badges	400	760
Tax Reclaimed	2,801	1,784
Donations (incl. Prov. Grand Lodge Meetings)	4,291	6,053
	<u>30,083</u>	<u>22,544</u>
<b>EXPENDITURE</b>		
Grand Mark Benevolent Fund	9,000	2,103
Festival Badges	500	1,000
Non Masonic Charities	8,050	11,326
GMBF Collarettes	0	5,250
Connaught Court/West Yorks Festival	0	0
	<u>17,550</u>	<u>19,679</u>
<b>Excess of Expenditure over Income/ Excess of Income over Expenditure</b>	<u>12,533</u>	<u>2,865</u>
<b>BALANCE SHEET AS AT 5th APRIL 2024</b>		
<b>CURRENT ASSETS</b>		
TSB Current Account	31,136	18,889
TSB Deposit Account	0	0
Virgin Money Deposit Account	35,455	35,169
	<u>66,591</u>	<u>54,058</u>
Debtor HMRC	0	0
	<u>66,591</u>	<u>54,058</u>
<b>ACCUMULATED FUND</b>		
Balance at 6th April 2023	54,058	51,193
Less: Excess of Expenditure over Income for the year	0	0
Add: Excess of Income over Expenditure for the year	12,533	2,865
Balance at 5th April 2024	<u>66,591</u>	<u>54,058</u>
<b>APPROPRIATION</b>		
General Reserve	61,265	54,058
Designated Funds - 2033 Festival	5,326	0
	<u>66,591</u>	<u>54,058</u>

Note: The Charity has a contingent liability in respect of amounts received from members, which may ultimately be used as payments towards Grand Mark Lodge charity collarettes: the figure has not been quantified.

**Report of the Accounts Examiner**

I have reported to the Charity Trustees of The North and East Yorkshire Mark Benevolent Fund that I have carried out an independent examination of the accounts of the Fund for the year ended 5th April 2024 and have given them an unqualified report in accordance with the General Directions given by the Charity Commissioners.



Whitby: August 2024

Trevor Chalmers FCCA

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