

Dr Eamon Phoenix Foundation
Report of the Trustees
for the Period 4 September 2024 to 30 June 2025

The trustees present their report with the financial statements of the charity for the period 4 September 2024 to 30 June 2025. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

The Dr Eamon Phoenix Trust was established by a trust deed on 29 November 2023 to embody the charitable vision and values of Eamon Phoenix. The Trust received charitable status from the Charity Commission for Northern Ireland (CCNI) on 4 September 2024.

This report covers the first period of Dr Eamon Phoenix Trust, from its establishment on 4 September 2024 to 30 June 2025.

OBJECTIVES AND ACTIVITIES

Objectives and aims

The charity's activities revolve around the following main areas:

Promoting the study of history as a way of fostering a deeper understanding of the past and thereby promoting reconciliation

Facilitating the study of history through activities such as seminars grants and bursaries to examine how a divisive and traumatic past has shaped and continues to influence relationships among communities and individuals in Ireland and Great Britain.

Engaging in community-based initiatives related to local history and history education

Actively promoting innovative connections between history, music, drama, art, and literature to celebrate and encourage the interplay of these disciplines.

Significant activities

During the initial period, the Trustees focused on:

Obtaining charitable status with the Charities' Commission for Northern Ireland (achieved on 4 September 2024: NIC 109942)

Opening a bank account

Establishing and piloting application and decision-making procedures (proactive approach with a research-based process)

Public benefit

In setting objectives and planning charitable work, the Trustees adhered to the guidance issued by the Charity Commission for Northern Ireland under section 4(b) of the Charities Act (Northern Ireland) 2008, known as the public benefit requirement statutory guidance.

FINANCIAL REVIEW

Financial Review

A summary of the results for the reporting period is available as part of this report and accounts.

FUTURE PLANS

The trustees will continue to apply the charity's resources in pursuit of its objectives. Future grant-making and activities will be guided by the charity's purposes and by the needs of beneficiaries as they arise, allowing flexibility to respond to changing circumstances and opportunities.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust and constitutes an unincorporated charity.

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The charity is governed by a trust deed dated 29 November 2023

Organisational structure

The trustees hold ultimate responsibility for the policies, activities, and assets of the charity. They meet regularly to review developments and seek advice from professional advisors when necessary.

Trustees

In accordance with the trust deed, there shall be a minimum and maximum number of trustees.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity number

109942

Principal address

10 Malone Court
Belfast
BT9 6PA

Trustees

Mrs A M Phoenix (appointed 4/9/2024)
Ms M F Moore (appointed 4/9/2024)
P Greer (appointed 4/9/2024)
N Purdy (appointed 4/9/2024)
Miss N Colligan (appointed 4/9/2024)
B Lambkin (appointed 4/9/2024)
Ms M Phoenix (appointed 4/9/2024)
J McDermott (appointed 4/9/2024)
Mrs R Radcliffe (appointed 4/9/2024)
P G Shevlin (appointed 4/9/2024)
Ms D MacBride (appointed 4/9/2024)

Independent Examiner

Malachy McGrady
M.B.McGrady & Co
Chartered Accountants
Rathmore House
52 St Patricks Avenue
Downpatrick
Co. Down
BT30 6DS

Approved by order of the board of trustees on 28 April 2026 and signed on its behalf by:

A. Phoenix

Mrs A M Phoenix - Trustee