

The Robertson Charitable Trust

Scotland · Charity number SC028285

Details

Status	Removed
Legal form	Trust (founding document is a deed of trust) (other than educational endowment)
Registered	1998-08-28
Removed	2025-09-03
Register	View on the OSCR register

Contact

Address	Ludlow Trust Company Ltd First Floor Tower Wharf Cheese Lane Bristol BS2 0JJ
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Activities

Activities: 'It makes grants, donations or gifts to organisations'

Purposes: 'the advancement of health'

What the charity does: To or for the benefit of such one or more of the following Charitable Institutions namely:-(i) HELP THE AGED, of St. James Walk, Clerken wall Green, London (but declaring that it is my wish that my Trustees shall subject to the provisionsof these presents ensure that any benefit conferred upon the said Charitable Institution shall be for use in connection with the activities of said Charitable Institution in Scotland only)(ii) ELPIS, having an office at Thirty Grace Street, Glasgow(iii)THE BAPTIST MISSIONARY SOCIETY, of P.O. Box 49, Baptist House, Broadway, Didcot, Oxon(iv) Such Charitable Institution as may be selected by my Trustees and based or carrying out its activities generally within the Edinburgh and Lothian area in connection with research into, concern with or the care, treatment oralleviation or relief of epilepsy provided always that such Charitable Institution shall come within the terms of Paragraph (iii) and (iv) of Section 1 hereof

Beneficiaries: 'People with disabilities or health problems'

Objectives: To or for the benefit of such one or more of the following Charitable Institutions namely:- (i) HELP THE AGED, of St. James Walk, Clerkenwall Green, London (but declaring that it is my wish that my Trustees shall subject to the provisions of these presents ensure that any benefit conferred upon the said Charitable Institution shall be for use in connection with the activities of said Charitable Institution in Scotland only) (ii) ELPIS, having an office at Thirty Grace Street, Glasgow (iii)THE BAPTIST MISSIONARY SOCIETY, of P.O. Box 49, Baptist House, Broadway, Didcot, Oxon (iv) Such Charitable Institution as may be selected

by my Trustees and based or carrying out its activities generally within the Edinburgh and Lothian area in connection with research into, concern with or the care, treatment or alleviation or relief of epilepsy provided always that such Charitable Institution shall come within the terms of Paragraph (iii) and (iv) of Section 1 hereof

Geography

- **Main operating location:** City of Edinburgh
- **Geographical spread:** Wider, but within one local authority area

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	-	-	-	-

The Robertson Charitable Trust

Scotland - Charity number SC028285

Accounts



Receipts and payments accounts							
For the period from	Period start date			to	Period end date		
	Day	Month	Year		Day	Month	Year
	29	August	2023		28	August	2024

Section A Statement of receipts and payments


	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total funds current period to nearest £	Total funds last period to nearest £
A1 Receipts						
Donations					-	
Legacies					-	
Grants					-	
Receipts from fundraising activities					-	
Gross trading receipts					-	
Income from investments other than land and buildings	11,349				11,349	10,084
Rents from land & buildings					-	
Gross receipts from other charitable activities					-	
Bank interest	1,029				1,029	370
A1 Sub total	12,378	-	-	-	12,378	10,454
A2 Receipts from asset & investment sales						
Proceeds from sale of fixed assets			416,203		416,203	138,957
Proceeds from sale of investments			-		-	-
A2 Sub total	-	-	416,203	-	416,203	138,957
Total receipts	12,378	-	416,203	-	428,581	149,411
A3 Payments						
Expenses for fundraising activities					-	
Gross trading payments					-	
Investment management costs			1,465		1,465	1,929
Trust management fees	3,517				3,517	1,727
Grants and donations	41,223		-		41,223	-
Bank charges	-		-		-	18
Cash management fees	33				33	12
Governance costs:					-	
Audit / independent examination	780				780	780
Preparation of annual accounts					-	
Legal costs					-	
Other					-	
A3 Sub total	45,553	-	1,465	-	47,018	4,466
A4 Payments relating to asset and investment movements						
Purchases of fixed assets					-	
Purchase of investments			404,358		404,358	124,662
A4 Sub total	-	-	404,358	-	404,358	124,662
Total payments	45,553	-	405,823	-	451,376	129,128
Net receipts / (payments)	(33,175)	-	10,380	-	(22,795)	20,283
A5 Transfers to / (from) funds	29,875	-	(29,875)	-	-	-
Surplus / (deficit) for year	(3,300)	-	(19,495)	-	(22,795)	20,283

Section C Notes to the Accounts


C1 Nature and purpose of funds (may be stated on analysis of funds worksheets)

Expendable endowment funds are those which are required to be invested to produce income but which may be transferred to unrestricted funds at the discretion of the trustees in order that they may be expended in furtherance of the charity's objectives.
 Unrestricted income funds are available for use at the discretion of trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

	Type of activity or project supported	Individual / institution	Number of grants made	£
C2 Grants				
			Total	

C3a Trustee remuneration If no remuneration was paid during the period to any charity trustee or person connected to a trustee cross this box (otherwise complete section 3b) 

	Authority under which paid	£
C3b Trustee remuneration - details		

C4a Trustee expenses If no expenses were paid to any charity trustee during the period then cross this box (otherwise complete section 4b) 

		Number of trustees	£
C4b Trustee expenses - details			

	Nature of relationship	Nature of transaction	Transaction amount (£)	Balance outstanding at period end (£)
C5 Transactions with trustees and connected persons	Ludlow Trust Company Limited	Trust management fess (VAT inclusive)	3,517	0

C6 Other information

APPENDIX 1



Office of the Scottish Charity Regulator

Trustees' Annual Report for the period							
Period start date				Period end date			
	Day	Month	Year		Day	Month	Year
From	29	August	2023	To	28	August	2024

Reference and administration details

Charity name
Other names charity is known by
Registered charity number
Charity's principal address

The Robertson Charitable Trust
SC028285
Ludlow Trust Company Limited
1 st Floor, Tower Wharf
Cheese Lane
Bristol Postcode BS2 0JJ

Names of the charity trustees on date of approval of Trustees' Annual Report

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Ludlow Trust Company Limited			
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Reference and administration details

Names of all other charity trustees during the period, if any, (for example, those who resigned part way through the financial period)

Name	Dates acted if not for whole year

Structure, governance and management

Type of governing document

Declaration of Trust dated 28 August 1998 as amended 3 September 1998

Trustee recruitment and appointment

New trustees are appointed by the existing trustees.

Objectives and activities

Charitable purposes

The charity's objectives are to apply the capital or the income of the trust;

- a) To or for the benefit of such or more of the following charitable institutions namely;
- i) Help the Aged
 - ii) Elpis
 - iii) The Baptist Missionary Society
 - iv) Such charitable institution as may be selected by the trustees and based on carrying out its activities generally within the Edinburgh and Lothian area in connection with research into, concern with or the care, treatment or alleviation or relief of epilepsy.
- b) To or for the benefit of such one or more charitable institution or charitable institutions as the trustees in their uncontrollable discretion may select provided always that the charitable institutions or institutions in question shall generally operate in similar charitable areas and with the same general purposes as the four charitable institutions hereinbefore specifically enumerated or
- c) In implementing or assisting to implement any charitable purposes which the trustees in their uncontrollable discretion may from time to time by minute resolve upon.

Summary of the main activities in relation to these objects

During the year under review the charity made grants of £13,741 to each of the following:

Age UK
ELPIS
The Baptist Missionary Society

In determining the activities undertaken the trustees have had regard to the Office of Scottish Charity Regulator's guidance on public benefit.

Financial review

Brief statement of the charity's policy on reserves

At the end of the accounting year the charity had free reserves amounting to £10,061 (2023: £13,361).

In addition to the free reserves the charity has bank balances of £3,630 (2023: £23,125) and investments of £414,209 within the expendable endowment fund.

The Trustees pursue a policy of maintaining a free reserve available to be spent in the furtherance of the charity's objectives, as well as covering future needs, opportunities, contingencies and risks.

Details of any deficit

Donated facilities and services (if any)

APPENDIX 1

Other optional information

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)		
Position (e.g. Chair)		
Date		

Independent Examiner's Report to the Trustees of The Robertson Charitable Trust

I report on the accounts of the charity for the year ended 28th August 2024 which are set out on pages 1 to 2.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts in accordance with the terms of the Charities and Trustee Investment (Scotland) Act 2005 and the Charities

Accounts (Scotland) Regulations 2006 (as amended). The charity trustees consider that the audit requirement of Regulation 10(1) (d) of the 2006 Accounts Regulations does not apply. It is my responsibility to examine the accounts as required under section 44(1) (c) of the Act and to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination is carried out in accordance with Regulation 11 of the 2006 Accounts Regulations. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeks explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the view given by the accounts.

Independent examiner's statement

In the course of my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with Section 44(1) (a) of the 2005 Act and Regulation 4 of the 2006 Accounts Regulations
 - to prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 Accounts Regulations

have not been met, or

2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



ACCA

KJF Accounting Ltd, 17 Sheringham Avenue, Southgate, London N14 4UB

Date: 14th May 2025

