

The Rotary Club of Linlithgow Grange Benevolent Fund

Scotland · Charity number SC040390

Details

Status	Active
Legal form	Trust (founding document is a deed of trust) (other than educational endowment)
Registered	2009-03-25
Register	View on the OSCR register

Contact

Address	9 Ashly Hall Gardens Linlithgow West Lothian EH49 7DN
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Activities

Activities: 'It makes grants, donations, loans, gifts or pensions to individuals','It makes grants, donations or gifts to organisations','It carries out activities or services itself'

Purposes: 'the advancement of education','the advancement of citizenship or community development','the advancement of public participation in sport','the relief of those in need by reason of age, ill-health, disability, financial hardship or other disadvantage'

What the charity does: Charity is set up to allow the Rotary Club of Linlithgow Grange to distribute funds to good causes as defined in the Trust.

Beneficiaries: 'Children or young people','Older People','No specific group, or for the benefit of the community','Other charities or voluntary bodies'

Objectives: The Trustees hereby declare that the Trustees shall hold the Benevolent Fund and all other monies which may from time to time be received by the Trustees under the direction of the Club and whether such monies shall arise from donations and bequests or from any other source and also of the investments for the time being representing the same (all of which are hereinafter included in the expression 'the Benevolent Fund) upon trust (subject only to express conditions imposed by the donor) to apply both to capital and the income of the Benevolent Fund to or for the benefit of needy or distressed persons and to or for the benefit of such charitable institutions, societies and objects as the Club shall from time to time direct.

Geography

- **Main operating location:** West Lothian
- **Geographical spread:** A specific local point, community or neighbourhood

Finances

Period end	Income	Expenditure	Assets	Employees
2025-06-30	£46,185	£44,331	-	0
2024-06-30	£37,185	£40,558	-	0
2023-06-30	£22,380	£21,297	-	0
2022-06-30	£14,402	£14,209	-	0
2021-06-30	£21,491	£20,750	-	0

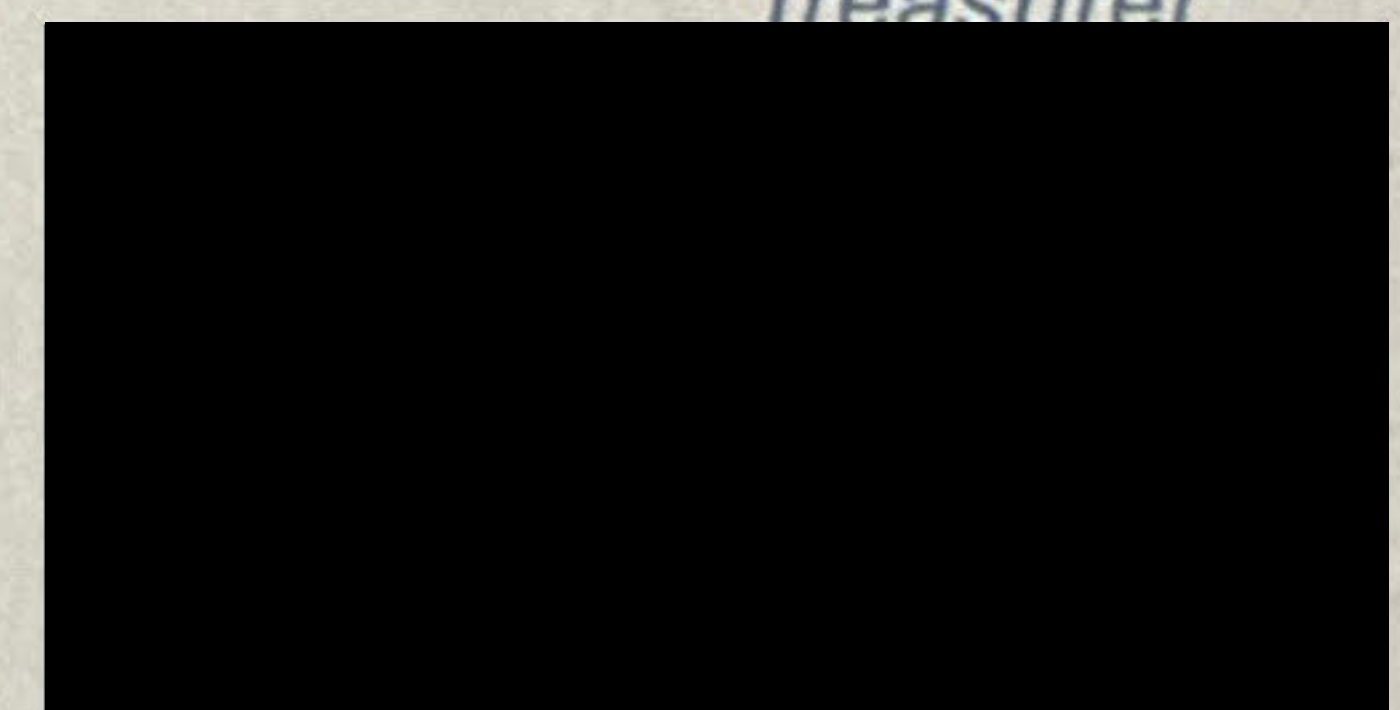
Accounts

Rotary Club of Linlithgow Grange



Benevolent Fund Annual Accounts
for period
1 July 2024 to 30 June 2025

Treasurer



Telephone: 07914 186211
Email: johngconnolly@hotmail.com

Rotary Club of Linlithgow Grange Benevolent Account

Trustees' Annual report for the year ending 30th June 2024 - Scottish
Charity

SC040390

The Trustees for the year to 30th June 2025 were:

Position	Name

The Trustees for the year to 30th June 2026 are:

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All the Trustees are members of the Rotary Club of Linlithgow Grange duly elected at the SGM of the Rotary Club held in December 2024.

Contact address

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Bankers

Virgin Money, 100 West Blackhall Street, Greenock, PA15 1XR

Examiner of Accounts

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Trustee Summary

The Benevolent Fund has continued its support for various International, National, and Local Charities, as well as individual beneficiaries. Key fundraising events and their contributions include:

AMAM: Raised £4200, distributed among Cross Reach, Quiet Waters, and Team Jak Foundation.

Gin and Beer Festival: Raised c£8050, benefiting Neils Hugs Foundation, Aid&Abet, and Smile Counselling.

Tree of Light: Raised c£3300, supporting Youth Space, West Lothian Foodbank, and Linlithgow First Responders.

Whisky Tasting: Raised c£3010 for End Polio Now.

Additional donations from the Benevolent Fund were allocated to organizations such as the Rotary Foundation, 1st Steps, Deacons Court, Round Table, Project Trust, RYLA, Shelterbox, Toy Box, West Lothian Foodbank, Challenge Enterprise, Linlithgow Athletics Club, Sports Bursary, and Men's Shed.

Independent Examiner's Report to the Trustees of the Rotary Club of Linlithgow Grange's Benevolent Fund

I report on the accounts for the Charity for the year end 30 June 2025 which are set out above.

Respective Responsibilities of the Trustee and Examiner

The Charities Trustees are responsible for the preparation of the Accounts in accordance with the terms of The Charity and Trust Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006. The Charity Trustee consider that the audit requirements of Regulation 10 (1) (D) of the accounts Regulations do not apply. It is my responsibility to examine the accounts as required under section 44 (1)(a) of the Act and to state whether particular matters have come to my attention.

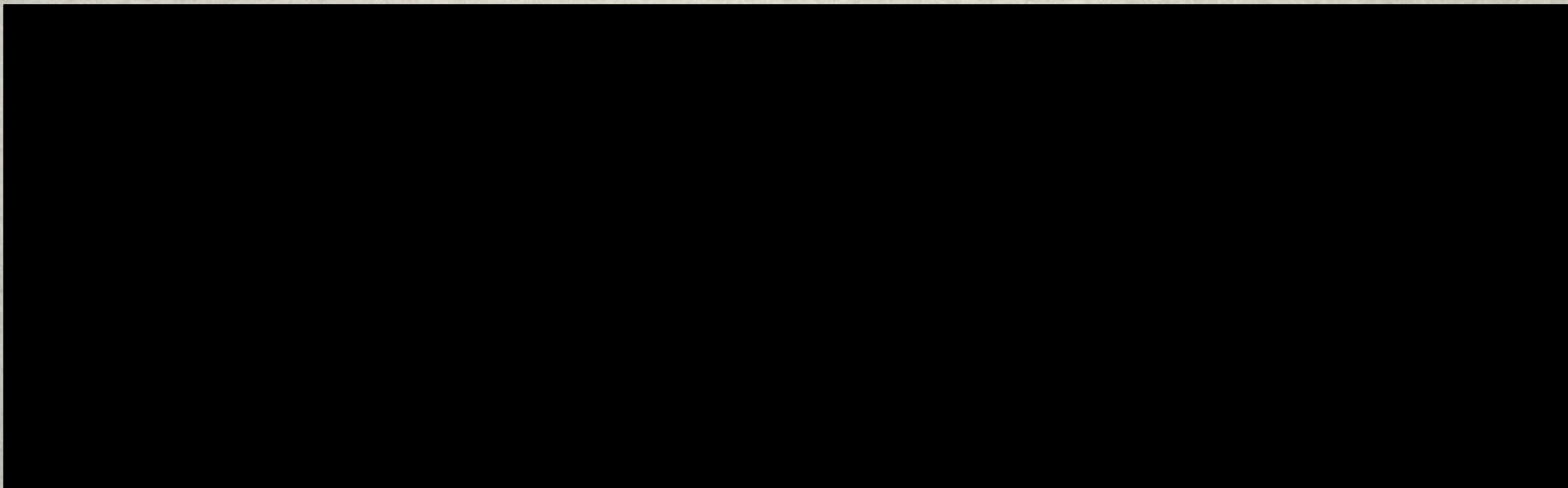
Basis of Independent Examiner's Statement

My examination is carried out in accordance with Regulation 11 of the Charities Accounts (Scotland) Regulations 2006. An examination includes a review of the accounting records kept by the Charity and a comparison of the accounts presented with these records. It also includes consideration of any unusual items of disclosure in the Accounts and seeks explanations from the Trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an Audit and consequently do not express an audit opinion on the view given by the accounts.

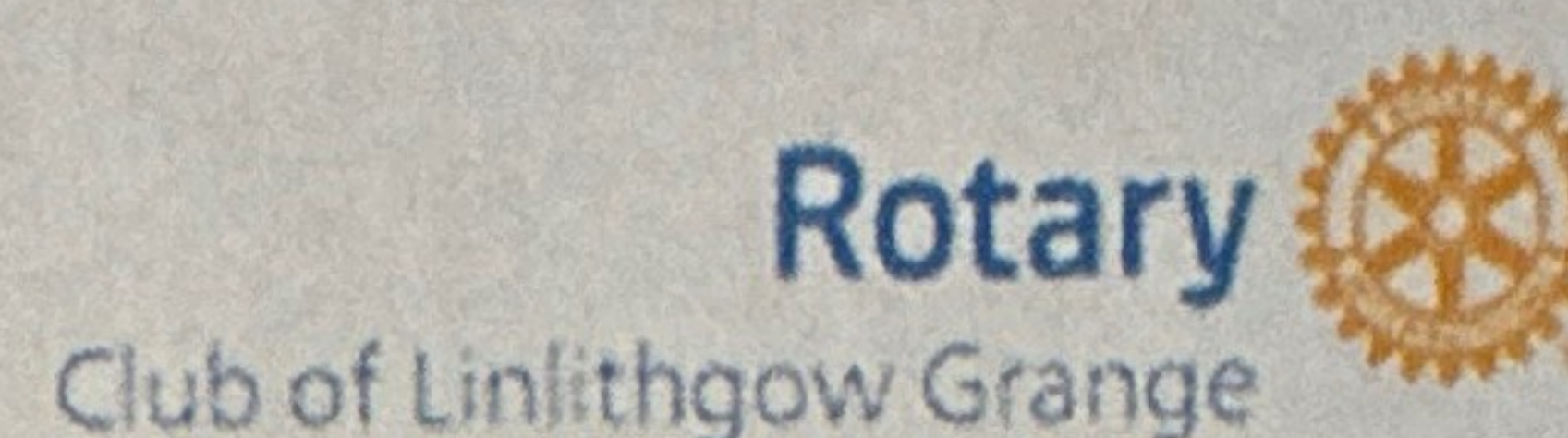
Independent Examiner's Statement

In the course of my examination no matters has come to my attention.

- 1) Which gives me reasonable cause to believe that in any material in respect the requirements
 - a) To keep accounting records in accordance with section 44 (1)(a) of the 2005 Act and Regular 4 of the 2006 accounts regulations and
 - b) To prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 accounts regulations
- 2) To which, in my opinion, attention should be drawn in order to enable a proper understanding of Accounts to be reached.



Rotary Club of Linlithgow Grange
Benevolent Fund (Registered with OSCR No SC040390)
Final Accounts for period ending 30 June 2025



Surplus / Deficit for year	£1,854.16
Balance brought forward from previous year	£4,206.46
Balance carried forward to next year	£6,060.62

Represented by Bank Balance	
Bank Balance as at 30 June 2025	£6,060.62
Cash in hand as at 30 June 2025	£0.00
Cheques not credited/banked as at 30 June 2025	£0.00
Balance as at 30 June 2025	£6,060.62

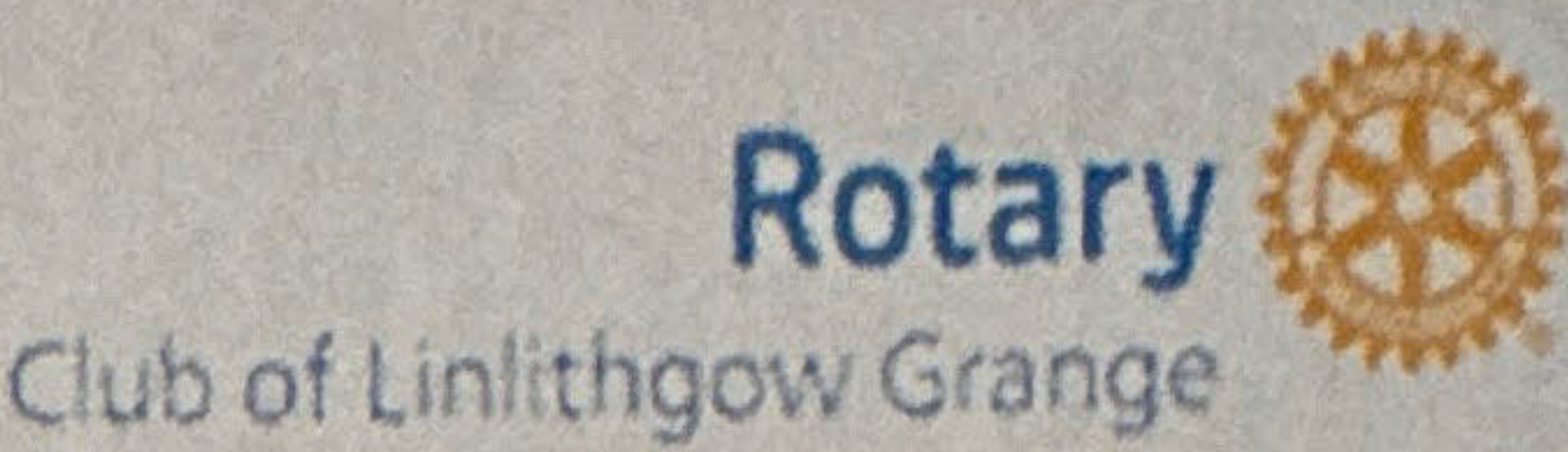
Income & Expenditure	Expenses, Charitable Activities, Allocated Fund Transfer	Ledger	Total Note
Income	Not applicable	Beer Festival	£13,002.34 Note 1
		AM-AM 2024	£5,462.97 Note 2
		Whisky Evening	£3,475.34 Note 3
		Tree of Light	£3,088.05 Note 4
		Bonus Ball 24/25	£2,503.00
		Charities Trust	£1,876.00
		Other	£1,676.00
		Toy Box	£1,575.00
		Corporate Donations	£1,199.40
		Gin Tasting	£1,181.44
		Coffee Morning	£1,135.40
		RFUK	£1,093.86
		HMRC Gift Aid	£798.87
		Shelter Box	£652.75
		District Grant - First Step	£570.00
		AM-AM 2025 Teams	£450.00
		Fines	£194.30
		Canal Fun Day	£176.55
		Street Fair	£151.40
		Beer Festival 2026	£150.00
		Interest	£131.46
		Local Donations	£66.25
		Bonus Ball 23/24	£60.00

Rotary Club of Linlithgow Grange
Benevolent Fund (Registered with OSCR No SC040390)
Final Accounts for period ending 30 June 2025

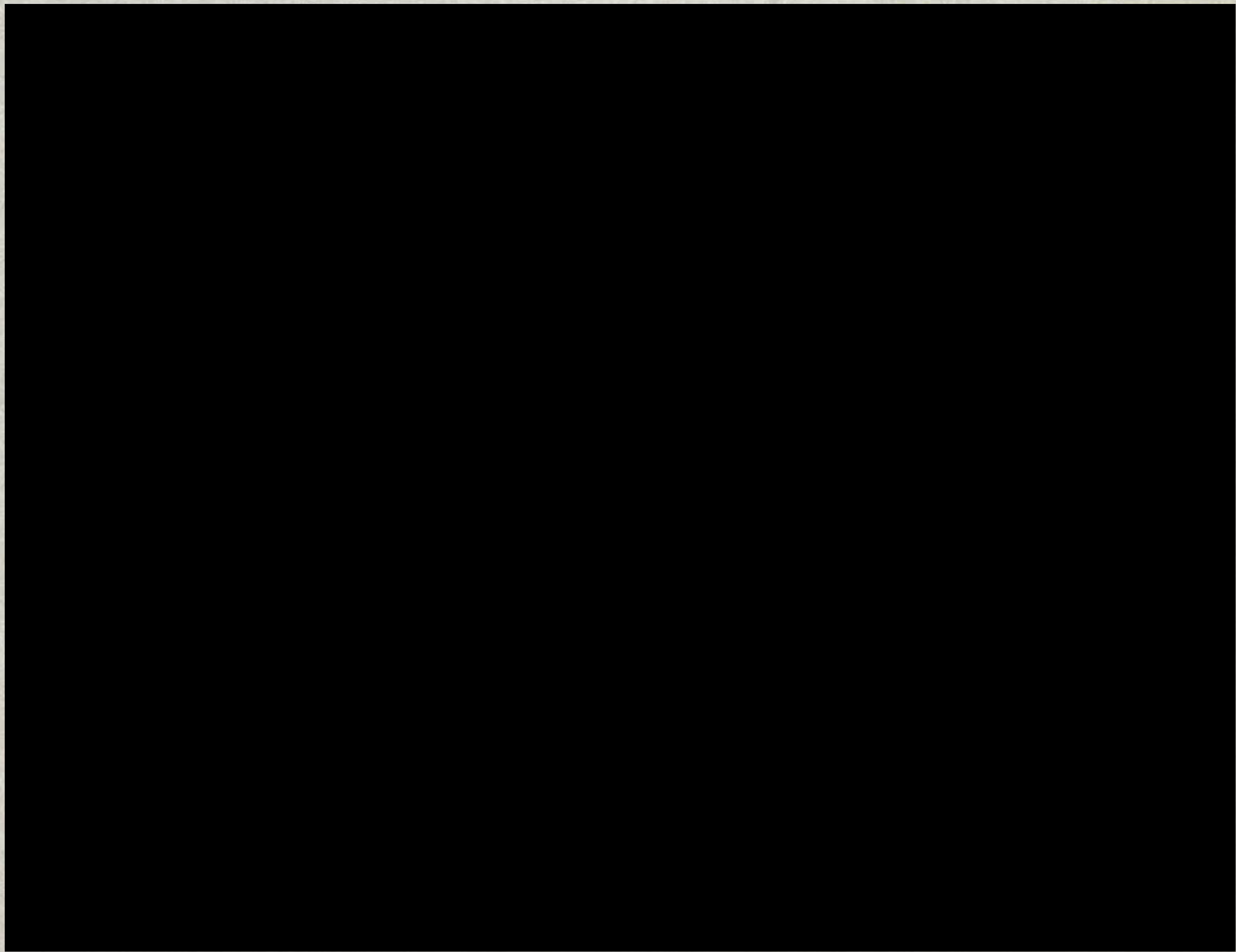
Rotary
Club of Linlithgow Grange

Income	Not applicable	AM-AM 2025 Sponsor	£50.00
		Sales	£2.00
		Wrong Account	£0.00
	Allocated Fund Transfer	Coffee Morning	£1,055.40
		Gin Tasting	£1,017.40
		Malawi	£1,000.00
		Bonus Ball payments	£652.00
		Shelter Box	£619.80
		District Grant - First Step	£570.00
		AMAM Disbursements	£251.96 Note 2
		Tree of Light	£211.95 Note 4
		Beer Festival	£60.00
		Toy Box	£25.00
Income Total			£46,185.89
Expenditure			
	Charitable Activities	Sports Bursary	-£250.00
		Challenge Enterprise	-£440.00
		RYLA Deposit	-£670.00
		Other	-£1,000.00
		Bonus Ball payments	-£1,085.00 Note 6
		RFUK	-£1,093.86 Note 6
		District Grant - First Step	-£1,140.00
		Shelter Box	-£1,272.55 Note 6
		Local Donations	-£1,600.00 Note 5
		Toy Box	-£1,600.00
		Whisky Evening	-£3,010.00 Note 3
		Tree of Light	-£3,300.00 Note 4
		AMAM Disbursements	-£4,200.00 Note 2
		Beer Festival	-£8,150.00 Note 1
	Expenses	Other	-£14.25
		AMAM 2025	-£50.40
		Street Gardens	-£64.00
		Coffee Morning	-£80.00
		School Quiz	-£100.00
		Float	-£100.00
		Gin Tasting	-£164.04
		Bonus Ball payments	-£245.00
		Jim Clark Trophy	-£250.00
		Whisky Evening	-£465.34

Rotary Club of Linlithgow Grange
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Expenditure	Expenses	TOL Disbursements	-£1,655.20 Note 4
		AM-AM 2024	-£1,881.01
		Beer Festival	-£4,987.57
	Allocated Fund Transfer	Toy Box	-£25.00 Note 1
		Beer Festival	-£60.00
		Tree of Light	-£211.95 Note 1
		AMAM Disbursements	-£251.96 Note 4
		District Grant - First Step	-£570.00 Note 2
		Shelter Box	-£619.80
		Bonus Ball payments	-£652.00
		Malawi	-£1,000.00
		Gin Tasting	-£1,017.40
		Coffee Morning	-£1,055.40
Expenditure Total			-£44,331.73



Rotary Club of Linlithgow Grange

Extract Accounts for 2023/2024 Benevolent Fund

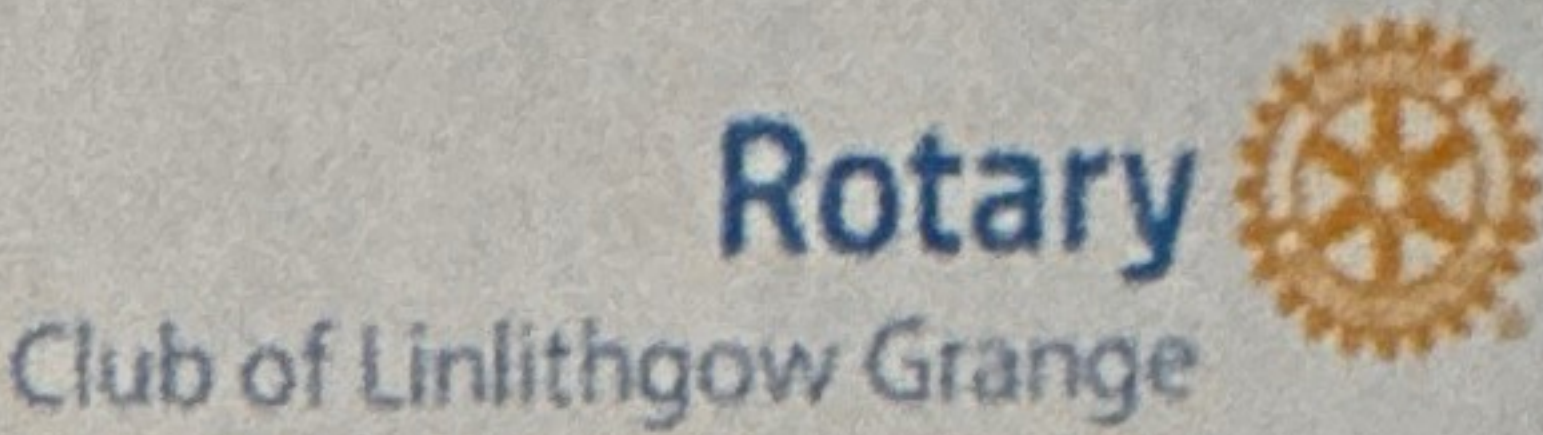
Note - Due to change in format in accounts, values displayed separately from 2024/2025 but can be used for comparison purposes

	2023-24
RECEIPTS	
Bonus Ball	£2,420.00
Bonus Ball 2024-25	£52.00
RFUK	£670.83
EPN	£109.00
District Grant	£1,275.00
TOL Sponsors	£600.00
TOL	£4,175.31
Donations Box	£215.00
Canal Fun Day/Street Fair	£332.94
Coffee Morning	£943.92
Whisky Evening	£3,461.70
Beer Festival	£8,563.64
Toy Box	£1,450.00
AM AM	£8,259.27
AM AM 24	£870.00
Foodbank	£325.00
Shelterbox	£58.50
HMRC Gift Aid	£503.74
Bank Interest	£505.84
Chaities Trust	£922.00
Matching Grant Tablet Sales	£387.00
Cash Back Debit Card Purchsaes	£3.83
Pay Pal (JC Tablet)	£542.13
Donations by Zettle Receipts	£380.00
Other	£159.00
	£37,185.65
PAYMENTS	
Fund Raising Expenses	
Bonus Ball Prizes	£1,217.00
AMAM	£2,569.33
Street Gardens	£26.40
Whisky Evening Expenses	£606.57
Primary Quiz	£100.00
Food Festival 2023	£60.00
Beer Festival	£4,108.07
Coffee Morning	£65.00

Rotary Club of Linlithgow Grange
Extract Accounts for 2023/2024 Benevolent Fund

Street Fair	£10.00
TOL	£818.79
Cheese & Wine	£75.00
Float RTn'd	£40.00
Payments to Charitable Activities	
Local Charities	£1,050.00
RYLA	£1,340.00
J Clark trophy	£236.00
Toy Box	£1,450.00
C F Football	£500.00
Clic Sargent Cancer	£250.00
Mens Shed (District Grant)	£2,956.54
F1 Low Port/ Sprungfield PS	£300.00
Foodbank	£325.00
Challenge Enterprise	£400.00
AMAM Disbursements	£6,200.00
TOL Disbursements	£4,200.00
Linlithgow Golf Club Boys Golf	£50.00
Deacons Court	£350.00
Beer Festival Disbursements	£4,350.00
Sports Bursary	£500.00
ShelterBox	£2,400.00
Social Enterprise Acadamy Ltd	£250.00
Round Table	£120.00
RFUK	£670.83
EPN	£2,964.13
Governance costs	£0.00
	£40,558.66
Deficit/Surplus for year	-£3,373.01
B/Fwd from prev year	£7,579.47
C/Fwd to next year	£4,206.46
Represented by Bank Balance	£4,206.46
Cash in Hand	£0.00
Chq not credited	£0.00
Chq not cashed	£0.00
	£4,206.46

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Allocated Fund	
No allocation	£3,434.45
TOL Sponsor Fund	£620.88
Malawi	£1,000.00
AMAM 2025	£449.60
Street Gardens	£59.94
Beer Festival 2026	£150.00
Bonus Ball 25/26	£45.75
Lend With Care	£300.00
	£6,060.62

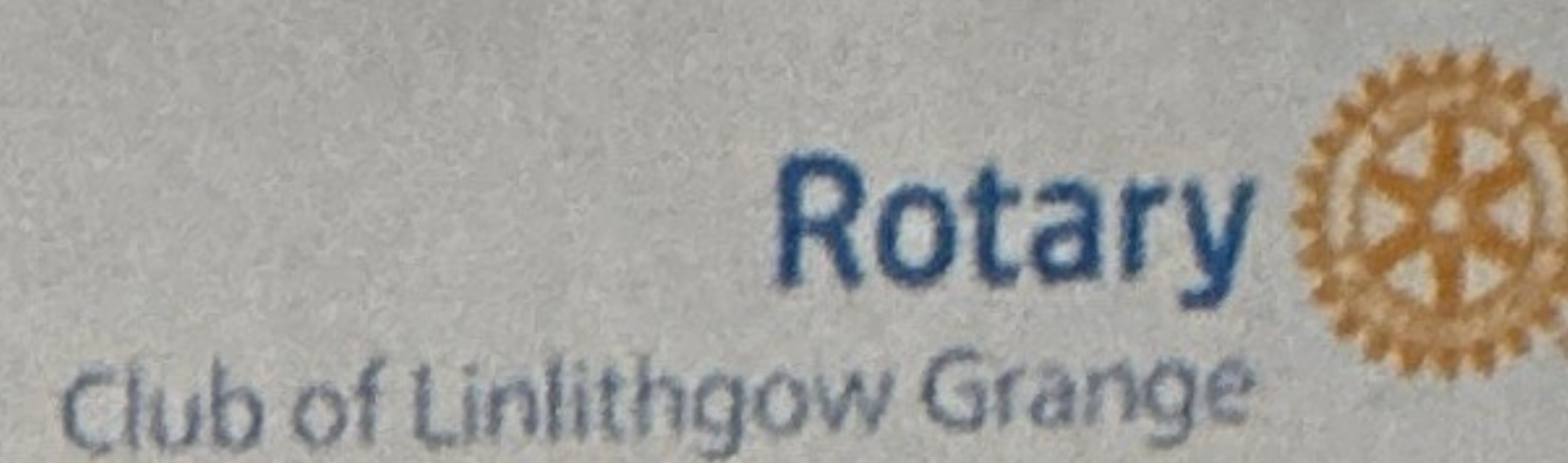
Note 1 - Beer Festival	
Sales and donations on day	£7,634.14
Sponsors	£5,368.20
Use of unallocated funds	£195.23
Neils Hugs Foundation Donation	-£2,850.00
Smile Counselling Donation	-£2,600.00
Aid and Abet Donation	-£2,600.00
MacMillan Cancer	-£100.00
Expenses	-£4,987.57 Beer, Gin, Hire of Burgh Hall, Gine and Beers Glasses, and Marketing

Note 2 - AMAM 2024	
Sponsors	£2,380.00 includes £870.00 paid in 2023/2024 financial year
Competitors	£2,560.00
Raffle, Tablets Sales, Donations	£1,392.97
Cross Reach Donation	-£1,400.00
Quiet Waters Donation	-£1,400.00
Team Jak Foundation	-£1,400.00
Expenses	-£1,881.01 Meals for Competitors, Prizes and Smacks
Transfers surplus to unallocated funds	-£251.96

Note 3 - Whisky Evening	
Tickets Sales / Donation	£2,510.34
Tablet / Tombola Stand	£357.00
Guess the botttle	£219.00
Bottle Auction	£389.00
End Polio Now Donation	-£3,010.00
Expenses	-£465.34 Food and Zettle Fees

Note 4 - Tree of Light	
Donations	£3,088.05
Use of unallocated funds	£211.95
Youth Space - LYPP - Donation	-£1,100.00
West Lothian Foodback - Donation	-£1,100.00
Linlithgow First Responders - Donation	-£1,100.00

Rotary Club of Linlithgow Grange
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Note 5 - Local Donations

Deacons Court	-£250.00
The Project Trust - Isla Storrar	-£250.00
The Project Trust - Evie Melvin	-£250.00
Low Port Primary	-£300.00
Santa Dash - Linlithgow Athletic Club Donation	-£200.00
Park Run - Linlithgow Athletic Club Donation	-£200.00
Linlithgow Round Table	-£150.00

Note 6 - Bonus Ball Donations

West Lothian Foodbank	-£165.50
Rotary Foundation	-£784.75
Shelterbox	-£48.50
RYLA	-£670.00
St Michaels Church	-£62.00
Marys Meal	-£24.25