

The Jim and Anne Carter McLean SCIO

Scotland · Charity number SC051805

Details

Status	Active
Legal form	SCIO (Scottish Charitable Incorporated Organisation)
Registered	2022-06-22
Register	View on the OSCR register

Contact

Address C/O Thorntons Law LLP
Kinburn Castle
St Andrews
KY16 9DR

Activities

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

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

What the charity does: Distribute monies of the James and Anne Carter Mclean estate to persons or organisations that fit with the charity's purpose.

Beneficiaries: 'Children or young people','People with disabilities or health problems'

Objectives: 4 The organisation's purposes are:- 4.1 The relief and support of children any individuals experiencing financial hardship in the UK. and 4.2 The advancement of education by promoting, sustaining and increasing education of students experiencing financial hardship in the UK, specifically within the remit of the subjects of science and the arts. and 4.3 The advancement of health by sustaining and supporting voluntary organisations providing home help, transport, daily care or food to physically or mentally impaired children or adults in Scotland. and. 4.4 The advancement of health by providing relief and support to terminally ill children and their families in the UK.

Geography

- **Main operating location:** Fife
- **Geographical spread:** Operations cover all or most of Scotland

Finances

Period end	Income	Expenditure	Assets	Employees
2025-11-30	£0	£6,000	-	0
2024-11-30	£53,998	£40,000	-	0
2023-11-30	£0	£0	-	0

The Jim and Anne Carter McLean SCIO

Scotland - Charity number SC051805

Accounts

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	1	Decem ber	2023	To	30	Novem ber	2024

Reference and administration details

Charity name	The Jim and Anne Carter McLean SCIO						
Other names charity is known by	-						
Registered charity number	SC051805						
Charity's principal address	C/O Thorntons Law						
	Kinburn Castle						
	St Andrews						
	Scotland				Postcode KY16 9D		

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	[REDACTED]	Trustee (Chair)		
2		Trustee		
3		Trustee		
4	[REDACTED]			
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
N/A	

Structure, governance and management

Type of governing document

The SCIO is governed by the Constitution, as provided to OSCR at the point of registration.

The SCIO is managed by the three Trustees; [REDACTED].

The registered office of the SCIO is Thorntons Law, St Andrews.

The SCIO annual income is expected to be less than £250,000, hence the SCIO does not appoint an external accountant or auditor and reports the annual financial statements to OSCR on a Receipts and Payments accounts basis.

Trustee recruitment and appointment

Following the death of the [REDACTED] (nee [REDACTED]), [REDACTED] approached his personal friends, [REDACTED] to help create a means to donate from his own personal estate to those in need. Both [REDACTED] gratefully accepted and along with [REDACTED], became the founding three Trustees upon the incorporation of the SCIO on 22nd June 2022.

We refer to clauses 18 and 19 of the Constitution. No other Trustees were required at the time of the incorporation of the SCIO or are deemed required at this period in time. There were no changes to the Trustees during the financial year.

Objectives and activities

Charitable purposes

As per the Constitution, Clause 4, the organisation's purposes are:

4.1 The relief and support of any individuals experiencing financial hardship in the UK; and

4.2 The advancement of education by promoting, sustaining and increasing education of

students experiencing financial hardship in the UK, specifically within the remit of the subjects of science and the arts; and

4.3 The advancement of health by sustaining and supporting voluntary organisations providing home help, transport, daily care or food to physically or mentally impaired children or adults in Scotland; and

4.4 The advancement of health by providing relief and support to terminally ill children and their families in the UK.

Summary of the main activities in relation to these objects

The Trustees have considered various registered charities or individuals that meet the criteria set above and agree their acceptance to provide cash donations where appropriate and within the confines of the balances available to the SCIO. During the financial year-ended 30th November, seven trustee approved charities received donations from the SCIO.

APPENDIX 1

Achievements and performance

Summary of the main achievements of the charity during the financial period

The SCIO was able to open banking facilities with Virgin Bank during the financial year ended 30th November 2024.

Following the opening of a bank account, ██████████ made personal cash donations to the SCIO totalling £53,998. The Trustees then discussed various worthy charities that fitted with the charitable purposes and objectives of the SCIO. Seven decisions were made and seven charities that fitted with the objectives of the SCIO received donations totalling £40,000.

There were no changes to the Trustees during the financial year-ended 30th November.

Financial review

Brief statement of the charity's policy on reserves

Cash balances will be maintained in the bank account of the SCIO in order to provide further charitable donations, as these are identified. The SCIO intends to distribute all reserves eventually to charitable causes.

Details of any deficit

Nil

Donated facilities and services (if any)

The sole income of the SCIO is by way of personal donations made by ■■■■■.

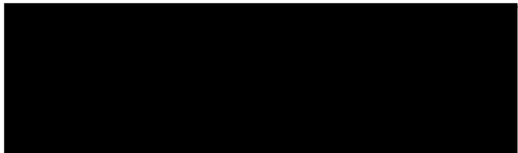
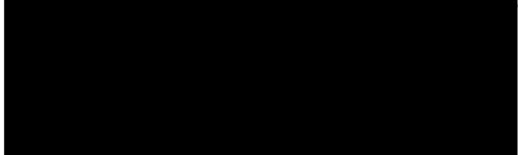
APPENDIX 1

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)	Trustee	
Date	29 September 2025	

The Jim and Anne Carter McLean SCIO

SC051805



Receipts and payments accounts							
For the period from	Period start date			to	Period end date		
	Day	Month	Year		Day	Month	Year
	1	December	2023		30	November	2024

Section A Statement of receipts and payments

	Unrestricted funds	Restricted funds	Expendable endowment funds	Permanent endowment funds	Total funds current period	Total funds last period
	to nearest £	to nearest £	to nearest £	to nearest £	to nearest £	to nearest £
A1 Receipts						
Donations	53,998	-	-	-	53,998	-
Legacies	-	-	-	-	-	-
Grants	-	-	-	-	-	-
Receipts from fundraising activities	-	-	-	-	-	-
Gross trading receipts	-	-	-	-	-	-
Income from investments other than land and buildings	-	-	-	-	-	-
Rents from land & buildings	-	-	-	-	-	-
Gross receipts from other charitable activities	-	-	-	-	-	-
A1 Sub total	53,998	-	-	-	53,998	-
A2 Receipts from asset & investment sales						
Proceeds from sale of fixed assets	-	-	-	-	-	-
Proceeds from sale of investments	-	-	-	-	-	-
A2 Sub total	-	-	-	-	-	-
Total receipts	53,998	-	-	-	53,998	-
A3 Payments						
Expenses for fundraising activities	-	-	-	-	-	-
Gross trading payments	-	-	-	-	-	-
Investment management costs	-	-	-	-	-	-
Payments relating directly to charitable activities	-	-	-	-	-	-
Grants and donations	40,000	-	-	-	40,000	-
Governance costs:	-	-	-	-	-	-
Audit / independent examination	-	-	-	-	-	-
Preparation of annual accounts	-	-	-	-	-	-
Legal costs	-	-	-	-	-	-
Other	-	-	-	-	-	-
A3 Sub total	40,000	-	-	-	40,000	-
A4 Payments relating to asset and investment movements						
Purchases of fixed assets	-	-	-	-	-	-
Purchase of investments	-	-	-	-	-	-
A4 Sub total	-	-	-	-	-	-
Total payments	40,000	-	-	-	40,000	-
Net receipts / (payments)	13,998	-	-	-	13,998	-
A5 Transfers to / (from) funds					-	
Surplus / (deficit) for year	13,998	-	-	-	13,998	-

Section B Statement of balances

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
B1 Cash funds	Cash and bank balances at start of year	13,998	-	-	-	13,998	-
	Surplus / (deficit) shown on receipts and payments account	-	-	-	-	-	-
	Cash and bank balances at end of year	13,998	-	-	-	13,998	-
	(Agree balances with receipts and payments account(s))	- 13,998	-	-	-	- 13,998	-

B2 Investments	Details	Fund to which asset belongs	Market valuation	Last year
			to nearest £	to nearest £
	Nil		-	-
		Total	-	-

B3 Other assets	Details	Fund to which asset belongs	Cost (if available)	Current value (if available)	Last year
			to nearest £	to nearest £	to nearest £
	Nil			-	-
		Total	-	-	-

B4 Liabilities	Details	Fund to which liability relates	Amount due	Last year
			to nearest £	to nearest £
	Nil		-	-
		Total	-	-

B5 Contingent liabilities	Details	Fund to which liability relates	Amount due (estimate)	Last year
			to nearest £	to nearest £
	Nil		0	0
		Total	-	-

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

Signature

Print Name

Date of approval

[Redacted Signature]

29.9.25

Section C Notes to the Accounts

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

The Jim and Anne Carter Mclean SCIO ("the SCIO") was first registered on 22nd June 2022.

Three Trustees of the SCIO who were appointed at the date of the registration, remained in service for the entire financial year-ended 30th November 2024..

The sole income of the SCIO is by way of personal cash donations made by the Trustee and Chairman of the SCIO, [REDACTED]. No external fund raising activities have been conducted for the SCIO and none are envisioned to be made in the future.

During the financial year to 30th November 2024, the Trustees were successful in opening banking facilities in the name of the SCIO, which became operationally active on 2nd January 2024.

[REDACTED] thereafter donated a total of £53,998 from his personal estate to the SCIO, of which the SCIO then made donations totalling £40,000, within the financial year ended 30th November 2024.

D

	Type of activity or project supported	Individual / institution	Number of grants made	£
C2 Grants	Nil		0	0
			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)	-
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	Authority under which paid	£
C3b Trustee remuneration - details	Nil	0

C4a Trustee expenses	If no expenses were paid to any charity trustee during the period then cross this box (otherwise complete section 4b)	-
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		Number of trustees	£
C4b Trustee expenses - details	Nil	0	0

	Nature of relationship	Nature of transaction	Transaction amount (£)	Balance outstanding at period end (£)
C5 Transactions with trustees and connected persons	Nil		0	0

C6 Other information

The Trustees of the SCIO do not receive remuneration for their services, nor have they claimed any expenses incurred during the financial year-ended 30th November 2024.



Additional analysis (1)

Analysis of receipts and payments

1 Donations

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
	53,998	-	-	-	53,998	-
Total	53,998	-	-	-	53,998	-

- - - - - - -

2 Grants

	Unrestricted funds to nearest £	Restricted funds to nearest £	Total current period to nearest £	Total last period to nearest £
Nil	-	-	-	-
Total	-	-	-	-

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3 Gross receipts from other charitable activities

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
Nil	-	-	-	-	-	-
Total	-	-	-	-	-	-

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4 Payments relating directly to charitable activities

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
Continuing Care Scotland	5,000	-	-	-	5,000	-
Make a wish foundation	5,000	-	-	-	5,000	-
Fife Gingerbread	5,000	-	-	-	5,000	-
Salvation Army	5,000	-	-	-	5,000	-
Cancer research	10,000	-	-	-	10,000	-
Age Scotland	5,000	-	-	-	5,000	-
Lexi May Trust	5,000	-	-	-	5,000	-
Total	40,000	-	-	-	40,000	-

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The Jim and Anne Carter McLean SCIO

SC051805

Additional analysis (2)**5 Breakdown of unrestricted funds**

	Unrestricted fund 1 - enter name of fund below	Unrestricted fund 2 - enter name of fund below	Unrestricted fund 3 - enter name of fund below	Unrestricted fund 4 - enter name of fund below	Total unrestricted funds	Total unrestricted funds last period
Receipts						
Donations	53,998	-	-	-	53,998	-
Legacies	-	-	-	-	-	-
Grants	-	-	-	-	-	-
Receipts from fundraising activities	-	-	-	-	-	-
Gross trading receipts	-	-	-	-	-	-
Income from investments other than land and buildings	-	-	-	-	-	-
Rents from land & buildings	-	-	-	-	-	-
Gross receipts from other charitable activities	-	-	-	-	-	-
Sub total	53,998	-	-	-	53,998	-
Receipts from asset & investment sales						
Proceeds from sale of fixed assets	-	-	-	-	-	-
Proceeds from sale of investments	-	-	-	-	-	-
Sub total	-	-	-	-	-	-
Total receipts	53,998	-	-	-	53,998	-
Payments						
Expenses for fundraising activities	-	-	-	-	-	-
Gross trading payments	-	-	-	-	-	-
Investment management costs	-	-	-	-	-	-
Payments relating directly to charitable activities	-	-	-	-	-	-
Grants and donations	40,000	-	-	-	40,000	-
Governance costs:	-	-	-	-	-	-
Audit / independent examination	-	-	-	-	-	-
Preparation of annual accounts	-	-	-	-	-	-
Legal costs	-	-	-	-	-	-
Sub total	40,000	-	-	-	40,000	-
Payments relating to asset and investment movements						
Purchases of fixed assets	-	-	-	-	-	-
Purchase of investments	-	-	-	-	-	-
Sub total	-	-	-	-	-	-
Total payments	40,000	-	-	-	40,000	-
Net receipts / (payments)	13,998	-	-	-	13,998	-
Transfers to / (from) funds					-	
Surplus / (deficit) for year	13,998	-	-	-	13,998	-

Nature and purpose of funds

The SCIO became active during the financial year to 30th November 2024. Donations provided solely by [REDACTED] were then used to donate to charities within the scope of the SCIO. The remaining cash balance on hand at 30th November of £13,998 shall be used in the future to provide additional donations to worthy charities or individuals.

The Jim and Anne Carter McLean SCIO

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Additional analysis (3)**6 Breakdown of restricted funds**

	Restricted fund 1 - enter name of fund below	Restricted fund 2 - enter name of fund below	Restricted fund 3 - enter name of fund below	Restricted fund 4 - enter name of fund below	Total restricted funds	Total restricted funds last period
Receipts						
Donations	53,998	-	-	-	53,998	-
Legacies	-	-	-	-	-	-
Grants	-	-	-	-	-	-
Receipts from fundraising activities	-	-	-	-	-	-
Gross trading receipts	-	-	-	-	-	-
Income from investments other than land and buildings	-	-	-	-	-	-
Rents from land & buildings	-	-	-	-	-	-
Gross receipts from other charitable activities	-	-	-	-	-	-
Sub total	53,998	-	-	-	53,998	-
Receipts from asset & investment sales						
Proceeds from sale of fixed assets	-	-	-	-	-	-
Proceeds from sale of investments	-	-	-	-	-	-
Sub total	-	-	-	-	-	-
Total receipts	53,998	-	-	-	53,998	-
Payments						
Expenses for fundraising activities	-	-	-	-	-	-
Gross trading payments	-	-	-	-	-	-
Investment management costs	-	-	-	-	-	-
Payments relating directly to charitable activities	-	-	-	-	-	-
Grants and donations	40,000	-	-	-	40,000	-
Governance costs:	-	-	-	-	-	-
Audit / independent examination	-	-	-	-	-	-
Preparation of annual accounts	-	-	-	-	-	-
Legal costs	-	-	-	-	-	-
Sub total	40,000	-	-	-	40,000	-
Payments relating to asset and investment movements						
Purchases of fixed assets	-	-	-	-	-	-
Purchase of investments	-	-	-	-	-	-
Sub total	-	-	-	-	-	-
Total payments	40,000	-	-	-	40,000	-
Net receipts / (payments)	13,998	-	-	-	13,998	-
Transfers to / (from) funds						
Surplus / (deficit) for year	13,998	-	-	-	13,998	-

Nature and purpose of funds

The SCIO made donations to seven separate charities totalling £40,000 during the financial year-ended 30th November 2024. The cash balance of £13,998 remained on the account in the name of the SCIO as at the financial year-end.

Section B Statement of balances

Categories	Details	Unrestricted funds	Restricted funds	Expendable endowment funds	Permanent endowment funds	Total current period	Total last period
		to nearest £	to nearest £	to nearest £	to nearest £	to nearest £	to nearest £
B1 Cash funds	Cash and bank balances at start of year	-	-	-	-	-	-
	Surplus / (deficit) shown on receipts and payments account	13,998	-	-	-	13,998	-
						-	
	Cash and bank balances at end of year	13,998	-	-	-	13,998	-
	(Agree balances with receipts and payments account(s))						

Categories	Details	Fund to which asset belongs	Market valuation	Last year
			to nearest £	to nearest £
B2 Investments	Nil		-	-
	Total		-	-

Categories	Details	Fund to which asset belongs	Cost (if available)	Current value (if available)	Last year
			to nearest £	to nearest £	to nearest £
B3 Other assets	Nil			-	-
		Total		-	-

Categories	Details	Fund to which liability relates	Amount due	Last year
			to nearest £	to nearest £
B4 Liabilities	Nil		-	-
	Total		-	-

Categories	Details	Fund to which liability relates	Amount due (estimate)	Last year
			to nearest £	to nearest £
B5 Contingent liabilities	Nil		0	0
	Total		-	-

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

Signature

Print Name

Date of approval

[Redacted Signature]

29.9.25