

THE WESTHORPE TRUST

REPORT TO THE ANNUAL PARISH MEETING – MAY 2021

Most of the Trust's income derives from its investments. Following the advice of its independent financial adviser and the objectives laid down in the Investment Policy Statement the Trust moved its portfolio to Brooks MacDonald in order to invest only in ethical funds. Despite the financial disarray caused by the global pandemic, the Trust has again managed its funds successfully. The Trust was unable to hold its regular May or November meetings in 2020 but all issues were covered by group emails.

During the past twelve months just over £7,400 has been distributed to residents covering personal grants, assistance with heating costs, academic and education, family and transport grants. A grant was also made to Bacton Under Fives nursery to help them continue running during the pandemic.

There is information about the history of the Trust and how it works on the Westhorpe Village website. There is also information about how to apply for grants, a downloadable application form and information about how to contact Trustees. The same information is available inside the Village Hall and in the Parish magazine.

The Westhorpe Trust is registered with the Charity Commission, charity number: 263332 and its details and financial overview may be viewed on the website of the Register of Charities: www.charitycommission.gov.uk

All requests for assistance from the Trust are treated with the utmost confidence and may be addressed to me – details below – or any of the Trustees:

Revd Philip Merry [Chairman]
Mrs Rosemary Mees [Churchwarden]
Mrs Gilly Christian
Mr Steve Christian
Mrs Amanda Rudd

Claire Barker
Secretary
Westhorpe Lodge
07876 496065
claire@ejbarker.co.uk