

THE WESTHORPE TRUST

REPORT TO THE ANNUAL PARISH MEETING – AUGUST 2020

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 has moved its portfolio to Brooks MacDonald in order to invest only in ethical funds. Despite the returns being lower and the ensuing financial disarray caused by the global pandemic, the Trust has managed its funds successfully. The Trust was unable to hold its regular May meeting but all issues were covered by group emails.

During the past twelve months just under £7,400 has been distributed to residents covering personal grants, assistance with heating costs, academic and education, family and transport grants. An additional grant was made to the Westhorpe Little Owls [under 12] for a very successful Christmas party in the Village hall

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 on 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
Mrs Gilly Christian
Mr Steve Christian
Mrs Amanda Rudd

Claire Barker
Secretary

Reg Charity No: 263332

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