Trustee Annual Report

Instructions

Add your Charity’s details in the square brackets [ ]. Then delete the [ ] .

Delete all of the red text

Charity Name [ ]

Charity no. [ ]

This report relates to financial year: [ ]

The principal address of the charity is [ ]

The following individuals were the charity trustees on the date the report was approved

[Trustee 1

Trustee 2

Trustee 3]

The following individuals served as charity trustees during the year:

[Trustee 1

Trustee 2]

The Charity was formed in [ ]. The Charity is governed by a [Constitution] [Trust deed].

The Charity is constituted as [an unincorporated association] or [a trust]. Delete whichever option does not apply to your charity.

The Charitable purposes of charity are [ ].

To further these purposes for the public benefit, we carried out the following activities:

[ ].

The main achievements of the [charity] in the year were:

[ ]

The trustees have read the Commission’s Public Benefit requirement statutory guidance, and have had regard to this when running the charity.

This guidance is available to read here:

<https://www.charitycommissionni.org.uk/media/1060/ccni-pbr1-public-benefit-requirement-v20.pdf>

A review of the charity’s financial position at the end of the year:

In the financial 20[ ]to 20[ ]. The Charity had an income of £[ ] and an expenditure of £[ ].

Make sure these figures match the figures in the accounts and the figures entered in the annual monitoring return.

Delete the sentence about funds materially in deficit that does NOT apply to your charity:

There are no funds held by the charity that are materially in deficit.

Or

The charity holds fund that are materially in deficit. The circumstances that lead the deficit are: [ outline the issues that lead to the fund being materially in deficit]. The Steps being taken to reduce the deficit are: [Outline the steps being taken to reduce the deficit].

Signature

[ ]

Print Name

[ ]

Date

[ ]