



## Trustees' Annual Report for the period

From

Period start date
31      3      2018

To

Period end date
30      3      2019

### Section A

### Reference and administration details

Charity name

The Saint George Educational Trust

Other names charity is known by

Registered charity number (if any)

1043158

Charity's principal address

225 Andover House

George Yard

Andover

SP10 1PB

### Names of the charity trustees who manage the charity

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1 M Fishwick	Chairman		
2 P Nicoletti			
3 T Grey			
4			
5			
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10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

### Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

**Names and addresses of advisers (Optional information)**

Type of adviser	Name	Address

**Name of chief executive or names of senior staff members (Optional information)**

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**Section B Structure, governance and management****Description of the charity's trusts**

Type of governing document (eg. trust deed, constitution)	Trust Deed
How the charity is constituted (eg. trust, association, company)	Charitable Trust
Trustee selection methods (eg. appointed by, elected by)	Appointment by majority agreement of trustees

**Additional governance issues (Optional information)**

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

**Section C Objectives and activities**

To promote the traditional Catholic Faith and to provide the means and facilities for its study, propagation and practice, especially in its social dimensions relating to civil society.

**Summary of the objects of the charity set out in its governing document**

**Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)**

During this reporting period a large part of the Trust's focus was directed towards pursuing a successful resolution to a dispute of many years-standing regarding a property bequeathed to the Trust, the ownership of which was under challenge.

The Trust continued throughout this period to maintain an online informational and educational portal – 'SGET Info' - providing news of interest to Catholics and to those who may have some degree of interest in Catholicism and its place in the world. The news and information provided by 'SGET Info' is mirrored on platforms provided by social media.

The Trust was pleased to be able to deepen its relationship with the Italian, Polish and other communities based in the U.K. and to develop a working relationship whereby the Trust raised donations from Italian nationals living in the U.K. to enable grants to be given towards developing structured home-education and pro-life work in Italy.

Having regard to the guidance issued by the Charity Commission in relation to public benefit, grants approaching a combined total of ninety-two thousand pounds were provided to associations of Christian faithful whose activities are in keeping with the aims and objectives of the Trust.

**Additional details of objectives and activities (Optional information)**

In the coming years the Trust intends to establish a study centre, or number of study centres, which will serve to provide facilities for the furtherance of the Trust's aims and objectives.

The Trust envisages that in future it will be able to provide suitable facilities for conferences, lectures, religious retreats, and for the reception of the Christian Sacraments.

Further to this the Trust envisages establishing and helping to maintain networks of primary, secondary and higher learning, as well as providing some measure of vocational training in practical skills such as building, motor mechanics and agriculture.

You may choose to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

## Section D

## Achievements and performance

### **Summary of the main achievements of the charity during the year**

In summary the main achievement of the Trust during this period has been to successfully conclude a drawn-out legal battle concerning a property bequeathed to the Trust, of which the ownership was in dispute.

The successful outcome of this legal action in favour of the Trust will ensure that the Trust can work towards achieving the aspirations outlined in this report.

## Section E

## Financial review

### Brief statement of the charity's policy on reserves

Currently the Trust does not maintain a reserve policy. A suitable reserve policy will be put into place once the Trust is in a position to establish its envisaged study centre (or centres).

### Details of any funds materially in deficit

### Further financial review details (Optional information)

You may choose to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

## Section F

## Other optional information

## Section G

## 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)	Michael Fishwick
Position (eg Secretary, Chair, etc)	Chairman
Date	27/01/20



CHARITY COMMISSION  
FOR ENGLAND AND WALES

<b>Charity Name</b> <b>The Saint George Educational Trust</b>	<b>No (if any)</b> <b>1043158</b>
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## **Receipts and payments accounts**

<b>For the period from</b>	Period start date 31st March 2018	<b>To</b>	Period end date 30th March 2019
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CC16a

## **Section A Receipts and payments**

## Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Bank Account	5,435	-	-
		-	-	-
		-	-	-
		<b>Total cash funds</b>	<b>5,435</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK
<b>B2 Other monetary assets</b>	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	Property at professional valuation	Unrestricted	-	700,000
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
	Loans	Unrestricted	23,100	No specific date
			-	-
			-	-
			-	-
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
	<i>Michael Fishwick</i>	<i>MICHAEL FISHWICK</i>	<i>25/01/20</i>	



# CHARITY COMMISSION FOR ENGLAND AND WALES

## Independent examiner's report on the accounts

### Section A

### Independent Examiner's Report

**Report to the trustees/  
members of**

Charity Name  
The Saint George Educational Trust

**On accounts for the year  
ended**

30<sup>th</sup> March 2019

**Charity no  
(if any)**

1043158

**Set out on pages**

CC16a – One-page (two sides) accounts

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30/03/2019.

**Responsibilities and  
basis of report**

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent  
examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below \*) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

\* Please delete the words in the brackets if they do not apply.

**Signed:**

*Hugh Williams*

**Date:**

25/01/2020

**Name:**

Hugh Williams

**Relevant professional  
qualification(s) or body  
(if any):**

Retired Professional Accountant

**Address:**

20 Barra Close

Highworth, Swindon

Wilts, SN67HX

**Section B****Disclosure**

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

**Give here brief details of any items that the examiner wishes to disclose.**