Charity Number 1164455

Appleby Castle – the home of Lady Anne Clifford

Trustees' Annual Report and Accounts

for the Financial Period

1 Apr 2025 – 31 Mar 2026

Appleby Castle – the home of Lady Anne Clifford

Trustees' Report and Financial Statements to 31st March 2026

Presentation

The trustees present their report and accounts for the year ended 31st March 2025 which have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard for Smaller Entities (the FRSSE) (effective 1 January 2015), applicable accounting standards and the Charities Act 2011. The trustees have prepared the accounts on the receipts and payments basis.

Public Benefit

The trustees have had due regard to the Charity Commission guidance on public benefit reporting in deciding what activities the charity should undertake. The remainder of this report illustrates the activities undertaken to support the public benefit requirement.

Reference and Administrative Information

Charity Name

Appleby Castle – the home of Lady Anne Clifford (Appleby Castle CIO)

Charity Trustees

Sally Nightingale (resigned 20 August 2026)
Dr Hugo Minney (Chair)
Giles Storey (resigned 20 August 2026)
Jessica Malay (appointed 20 July 2026)
Debbie Creighton (appointed 20 August 2026)
Sue McGuinness (appointed 18 September 2026)

(3 trustees in post at 31 Marcy 2026, 4 trustees in post at date of submission)

Address

Appleby Castle,
Boroughgate
Appleby-in-Westmorland
CA16 6XH

Independent Examiner

Since there have been no transactions on the accounts and there is no bank account, there is no requirement for an independent examiner

Structure and Organisation

Appleby Castle – the home of Lady Anne Clifford (Appleby Castle CIO) is a registered charity which operates according to its constitution.

The trustees consider the progress of the charity and its future directions and activities, and manage the charity.

Trustee Appointments

Trustee appointments are not limited by terms. Trustees are invited according to the skills and experience that they can contribute to the future directions and activities of the charity. New trustees are provided with support to enable them to understand and undertake their duties.

Volunteer Support

The charity is reliant on the support of its volunteers and trustees to achieve its objects. The work of volunteers is invaluable.

Objectives and Activities

Charitable Objects

The charity has the following object:

The objects of the CIO are the maintenance, repair and preservation for the benefit of the public of those parts of Appleby Castle which are open to the public.

Achievements and Performance

The CIO has not been required to act, having not undertaken any activities during the financial period reported. No funds have been raised, and no expenditure incurred.

This is partially due to the good management of Appleby Castle Ltd, which already makes parts of Appleby Castle open to the general public, usually free of charge, and provides a space in the castle and grounds for events to celebrate the year around in the town of Appleby-in-Westmorland.

Financial Review

There is nothing to review

Reserves Policy

There is nothing to report

Future Plans

The charity was formed in order to manage any major funds needed for structural repairs and for activities amongst the people of Appleby-in-Westmorland.

The charity is undergoing a restructure and change of Trustees in order to become more active as a contributor to the maintenance, repair and preservation for the benefit of the public of those parts of Appleby Castle which are open to the public. This is likely to include events including historical lectures and garden parties, as part of fundraising for materials and services.

Appleby Castle – the home of Lady Anne Clifford

Trustees' Report and Financial Statements to 31st March 2026

Responsibilities of the Trustees

Charity law requires the trustees to prepare financial statements for each financial period, which show a true and fair view of the state of affairs of the charity and its financial activities for that period. In preparing those financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently:
- make judgments and estimates that are prudent and reasonable:
- state whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures disclosed and explained in the financial statements; and

- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in existence.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Signed on behalf of the trustees

9:46 am, 06 Oct 2026
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Dr Hugo Minney

Date: 06 October 2026

Appleby Castle – the home of Lady Anne Clifford

Trustees' Report and Financial Statements to 31st March 2026

Receipts and Payments Account for the year ended 31st March 2026

	Notes	Unrestricted Funds	Restricted Funds	Total 2026	Total 2025
Income and endowments from					
Donations and legacies		0.00	0.00	0.00	0.00
Grants		0.00	0.00	0.00	0.00
Total		0.00	0.00	0.00	0.00
Expenditure on:					
Charitable activities		0.00	0.00	0.00	0.00
Total		0.00	0.00	0.00	0.00
Net income/ Expenditure		0.00	0.00	0.00	0.00

Statement of Assets and Liabilities as at 31st March 2026

	Notes	Total Funds 2026	Total Funds 2025
Current Assets			
Cash at bank and in hand		0.00	0.00
Total		0.00	0.00
The funds of the charity		0.00	0.00
Total		0.00	0.00

The financial statements on this page were approved by the trustees and signed on their behalf by:

9:46 am, 06 Oct 2026
1164455 TAR Accounts Mar2026.pdf

Dr Hugo Mainey

Date: 06 October 2026