Appendix 1

Trustees' Annual Report on the year 2025

Highlights of 2025

2025 was another strong year for the Mortimer History Society with a range of fascinating conferences, talks and events that reflect the broad range of interests of our members, alongside our support for academic research and endeavour, and the continuing development of the society and growth in membership. Highlights include:

- Embedding and growing our use of social media to reach new audiences

- The MHS Heraldry Study Group, which was launched in 2024, has gone from strength to strength with the creation of a freely available online 20-module step-by-step course on the language of heraldry. We received an email recently from a young student in Spain expressing his gratitude for the course (and asking if there was a certificate for completion!).

- Our regular programme of hybrid (in-person and online) conferences, online mini-conferences and study trips went from strength to strength with numerous members enjoying a range of fascinating topics, including marking the 600th anniversary of the death of the last male Mortimer, lord of Wigmore (Edmund, d. 1425), and the 800th anniversary of the 1225 Magna Carta. This year, we also held a successful Garden Party at Wigmore Abbey to raise funds for our annual Essay Prize.

- Thanks to the enormous generosity of MHS members and supporters we continued to encourage, support and enable research into the Mortimers and the medieval March of Wales: we were able to grant two research bursaries of £1,000; the MHS Essay Prize received high-quality entries, and the Society again sponsored sessions at the Leeds International Medieval Congress. Now in its third year, the 'Online Seminar Group: Medieval Wales and the March' again had a varied and interesting programme across the three academic terms.

- *Mortimer Matters* continues to provide essential information about the Society and its activities along with a range of stimulating articles, whilst the MHS Journal vol 6 was published in 2025.

- Through its regular online meetings to transcribe and translate medieval documents, the members of the Medieval Documents Research Group continue to develop their skills. The completion of the transcription and translation of the Mortimer family chronicle section of the manuscript known as Chicago MS 224 is a notable achievement.

- The Herefordshire Committee of the Victoria County History has begun work which will lead to the publication of histories of Leintwardine and Wigmore.

As in previous years, the rest of this annual report is structured in line with the objectives of the Society as set out in our constitution, to show how we are meeting them.

1. ***Promoting the significance of the history of the medieval Mortimer family, and the Welsh Marcher lordships***

In many ways, this objective is a catch-all that encompasses all the activities that we do. It is a thread, therefore, that runs through all the sections below as our programme of events, work with schools and universities, website, publications and all the other activities combine to promote the significance of the medieval Mortimers and the Welsh Marcher lordships.

Social Media

Having revisited and revived our presence across social media platforms in 2024, our focus this year has been on growth. We now have approaching 400 follows on Instagram, close to 1,000 on X (formerly Twitter) and over 200 on Facebook. We see social media as an increasingly important communication channel for us that will extend our reach, strengthen our membership drive and enable us to share important society news and initiatives more widely. Digital channels are now the primary source of news, information and insights for most people and it's important for us to be there. In short, our social platforms will help connect the MHS to its members, members to each other and all of us to the wider world.

Responsibility for posting and monitoring our social media pages is now shared between a working group of three; Annie Garthwaite, Alastair Ayrton and Pamela Thom-Rowe

Find us on social media at:

On X @MortimerSociety

On Instagram @therealmortimerhistorysociety

On Facebook @therealmortimerhistorysociety

On YouTube, we continue to post videos of conference presentations at @MortimerHistorySociety.

Please ensure you're following us on these pages.

General Publicity

The regular publicity for events maintains the profile of the Society, along with the publicity leaflet in many public places. We remain in regular contact with all the major historical societies across Wales and the Marches, many of whom happily circulate information about MHS events to their members. This has resulted in both increased attendance and new members.

2. ***Work with communities and schools to promote study of the Mortimers and the Welsh Marcher lordships and raise awareness of their significance in medieval history***

Schools Medieval History Programme

Preparations for the 2025 programme began in November 2024 with a meeting called for all schools interested in taking part to begin planning for the following year. However, the weather put paid to any meeting taking place. On the first occasion a heavy fall of snow prevented us

from getting together. The second attempt was foiled by heavy rain and flooding. This seemed to set the mood for the rest of the year, with a greatly reduced number of schools taking part and consequently a much smaller number of children.

We were disappointed that this downturn affected both the Living History Day in Ludlow Castle and the delivery of our in-school sessions, none of the latter were booked. Perhaps it should not have been such a surprise. Many of the schools that take part in the programme do so biannually because of their combined classes. I am hoping that the number will pick up in 2026.

In the end just six schools took part in our Living History Day, bringing 171 children to the castle. Our search for a replacement for Mike Beazley as the man-at-arms had produced a volunteer who pulled out only a few weeks before the event. We were very grateful to Mike's son who, with his father's help acted the part on the day.

The weather was wonderful, and the children enjoyed the usual six events in rotation. It was good to see them all taking such an interest in every activity. At lunchtime we kept the format for the fight that we had introduced last year. The knight was seen off by an archer and an armed man to a chorus of cheers! Despite all our concerns prior to the event, the day in the castle in June was dry-weathered and successful with everyone who took part making very favourable comments. When we asked the schools if they wanted us to maintain the yearly programme the answer was a resounding "yes". We are all looking forward to this year's event which has been booked for Wednesday June 26th.

Not surprisingly, the finances of the programme were stretched. The income from the schools was £1,710 but the costs were £2,600 leaving a loss of £890. We were lucky to be able to use some of the surplus from the previous year to cover the shortfall.

Last year was Kathy Cowell's last as the organiser of the programme as she was elected to Ludlow Town Council in May and later became the Deputy Mayor. Consequently, she felt that she could not devote enough time and so stood back from the schools' programme, while remaining as a Trustee of the Society. We were very lucky to find a local member, Alan Dowdy, who was very happy to take over responsibility for the programme, and we wish him every success for the future.

Talks to other societies

Every year we are invited to give talks to other societies about the Marcher lordships and/or the Mortimers, with talks given to many societies in 2025, generating new interest in the Mortimers and the Marcher lordships and attracting new members.

Community Information stalls

Although the Society had planned to have its regular information stall at the Battle of Evesham Medieval Re-enactment weekend at the start of August, it had to be cancelled at the last minute due to the unavailability of volunteers caused by illness.

3. ***Work with colleges and universities to encourage and support local and national scholarly research into the contribution of the medieval Mortimer family to the history and culture of the British Isles, and also of the history, economy, society, and culture of the medieval Marches of Wales***

MHS Research Bursary

Professors: Helen Fulton and Janet Burton – who have given excellent professional guidance since the Bursary's inception – have agreed to continue in their role as assessors this year. This is very pleasing news. Annie Garthwaite has been busy organising changes that need to be made to the MHS website, plus contacting social media sites and relevant universities alerting them that applications will be sought for the 2026 Bursary. The current round of fundraising for the Bursary is going well, and we should be able to again offer two bursaries. Applications will be advertised soon.

The two recipients of bursaries in 2024 have shown they were worthy winners of the award. Joshua Williams reports that the money allowed him to visit archives etc to carry out the necessary research for his PhD. Having written three chapters of his thesis, he is now making excellent progress. He expects to complete his PhD in the planned three years. Although Catherine Clark had to take a break from her PhD studies, the bursary enabled her to go to several colleges at Oxford and Cambridge Universities to examine books held there, to handle original documents and see the scribbles and annotations in them, bringing the monks at Buildwas to life. She has now restarted her PhD, looking especially at the archaeology of her chosen sites.

Both Joshua and Catherine have said how grateful they are for the award.

For the 2025 award, Tristan Wood and Jonathan Moore both produced interesting applications: Tristan is studying native people in Wales and the Marcher border, while Jonathan is studying St Victor who worked at Wigmore Abbey. Tristan gave an online talk at the January Conference 2026, whilst Jonathan talked about the Mappa Mundi and St Victor at Fownhope Church, Herefordshire at the end of July 2025, and will be contributing a talk at our 2026 Spring Conference.

The Mortimer History Society Essay Prize

The MHS launched its tenth Essay Prize in May/June 2025, which continues to celebrate and reward academic excellence, discovery, and original research, particularly into the medieval Mortimer family and the Welsh March. In April 2025, we were immensely proud to announce our 2024 winners. First Prize was awarded to Dr Rhun Emlyn of the Department of History and Welsh History at Aberystwyth University, whose essay *A 'Hawk in Holy Orders': the fourteenth-century Marcher cleric who instigated a rebellion*, explored the significance of the clergy in instigating and encouraging rebellion in post-conquest Wales, and highlighted the role of Hywel Cyffin (*alias* Hywel ap Madog), a successful and respected cleric, in the Glyndŵr Rebellion. No Second Prize was awarded this year, but Josh Williams, a second-year PhD student at Swansea University, was commended for his submission, *The Welsh Diaspora in Ludlow, c. 1283–1542: A Case Study in Postcolonial Immigration*, wherein he viewed Welsh immigration to the 'border' town of Ludlow, Shropshire, in the later medieval and early modern periods through the prism of modern, postcolonial theory.

Dr Rhun Emlyn received £750 for his success in the Essay Prize, as well as free membership of the Society for three years. His essay will also be published in volume 8 of the Society's Journal, which is due to be published by the end of August 2026.

The entry period for the 2025 Essay Prize closed on 15 February 2026, and we expect to announce the winners in late April 2026.

Leeds International Medieval Congress, 7–11 July 2025

The sessions sponsored by the Society have become a regular part of the Leeds International Medieval Congress (IMC), the world's premier academic conference for medieval studies, held annually at the University of Leeds. In 2025, the strand was organised by Jenny Bell of Bangor University. Again, we awarded bursaries to scholars who were giving papers in our sponsored sessions and did not have access to institutional funding. Under the IMC 2025 umbrella theme of *Learning*, the MHS sponsored three sessions, with eight speakers contributing fascinating papers that brought new research to life.

The first session was titled *Learning and Medieval Wales, I: Literacy, Writing, and Centres of Learning in Early Medieval Wales*. The speakers – Caroline Bourne and Peter McIntosh – explored '*Like rivers to the sea': The popularity of Centres of Learning in Early Medieval Wales*, and *Scaegōman in the Additions to the Hereford Gospels*.

During the second session, titled *Learning and Medieval Wales, II: Legal Authorities*, the three speakers – Sara Elin Roberts, Angharad Elias, and Sebastian Rider-Bezerra – analysed aspects of medieval Welsh law through their respective papers: '*From the best books': Writing Cyfraith Hywel Law Books*, and *Law and Learning in Medieval Wales: Cynyr ap Cadwgan's Family of Welsh Lawyers*, and finally, '*The verdict shall be referred to the canonists': Judicial Appeal and the Bounds of Legal Knowledge in Medieval Wales*.

The third session, titled *Learning and Medieval Wales, III: Literary and Cultural Influences* concluded the programme with three papers by River Atwood, Kit Tredwell and Paul Anthony Watkins, which covered the diverse topics of *The Grove of the Llatai,* and *'A widowed countess owns her castle': Femininity and the March in Romance Literature*, and *Cardigan Castle: a Lost Camelot, the Seat of an Ancient King, or the Clever and Learned Decision of a Very Gifted 12-century Welsh ruler*.

An excellent aspect of the week is the many academics and scholars who express their appreciation for what the Society does to encourage and support research, particularly by young scholars, through the Essay Prize, the Journal, IMC sponsorship, Online Seminar Group, and the Research Bursary.

Online Seminar Group: Medieval Wales and the Marches

The online seminar group which enables scholars and academics to share their research continued to develop with a further five seminars across the three terms. As in previous years, the papers covered a range of fascinating topics evidencing the breadth and variety of the research that is happening into medieval Wales and the March. Subjects covered were: the Black prince and the earldom of Cheshire in the late fourteenth century; property and locality in medieval Shropshire; literary culture in the Welsh March; a case study of critical locality in

the early medieval March in the lower Wye Valley; and, an exploration into who was the mother of Gwladus Ddu.

4. ***Increase knowledge about the Mortimer family and all aspects of the Welsh Marcher lordships through lectures, conferences, study trips and publications*.**

Annual Programme of Conferences, Lectures and Study Visits

During 2025 the Society enjoyed a diverse and stimulating programme of conferences, talks and events. The *Marcher Miscellany* online conference in February had three fascinating talks on aspects of the medieval March of Wales, whilst the November online conference had three talks on aspects of faith and religion. The AGM in April was preceded by a tour of the historic Brampton Bryan Hall led by the owners, Victoria and Edward Harley, who also provided delicious refreshments. With 2025 marking the 600th anniversary of the death of Edmund Mortimer, the last lord of Wigmore to bear the Mortimer family name, the annual full-day Spring Conference in May focused on *The Mortimers of Wigmore: Dynasty of Destiny*. And, to mark the end of Mortimer involvement in Ireland, the John Grove Memorial Lecture in June was incorporated into an evening online conference with three talks on the Mortimer's role in Ireland.

With 2025 also being the 800th anniversary of the version of Magna Carta that reached the statute book, the full-day Autumn Symposium in October comprised five talks which explored the importance of the 1225 Magna Carta, it's impact and legacy.

We were delighted to organise an online launch in September for the publication of David Stephenson's new book, *Heirs to the Princes: The Welsh Administrative Elite, from the Edwardian Conquest to the Black Death*.

On a lovely Saturday afternoon in July (the sunshine just about held on, whilst the rain held off until everyone had departed), members enjoyed a garden party at Wigmore Abbey with garden games, archery and sword and buckler demonstrations (with the opportunity to have-a-go), and delicious food.

Mortimer History Society Journal

After the successful publication of the sixth volume of the Journal of the Mortimer History Society (which contained no fewer than five peer-reviewed essays and three reviews), the MHS is due to publish its seventh volume in the series in March 2026. This seventh volume contains two award-winning essays submitted to the Mortimer History Society Essay Prize, together with two commended entries submitted to the same competition as well as an essay by one of the foremost authors of popular medieval history books in the UK today. The first-prize winning essay of Dr Ian Bass (*An Ecclesiastical Mortimer: The Career of Edmund Mortimer in the Church*), explores the church career of Edmund Mortimer (d. 1304) while providing an informative and long overdue insight into this fascinating medieval figure and senior member of the Mortimer family. The second prize-winning essay of Ali Al-Khafaji, a fourth-year PhD student at the University of Bristol *('The Prince de Cestre' and the Curious Case of TNA, SC 8/305/15233*), reveals how a specific use of a royal title long understood to refer to Richard II (d. 1399) in fact relates to his father, Edward (d. 1376), the Black Prince, thus highlighting yet again the impact which rigorous archival work and documentary analysis can have upon our understanding of key figures in the Middle Ages. The two commended essays were produced

by Caroline Bourne, a post-doctoral researcher at the University of Reading and by Catherine Clarke, a second-year PhD student at the University of Keele, in line with the Society's continued commitment to supporting doctoral researchers and early-career scholars. Lastly, an essay by Dr Ian Mortimer ('The common law and the 'rightfulness' of the duke of York's claim to the throne in 1460') provides analysis of the law of succession and its stages of development from the Conquest (1066) onwards, and of its interrelationship with the common law, all of which is expertly applied to assess the strengths and weaknesses of the Yorkist claims to the throne.

Moreover, the seventh volume, due for publication in March 2026, contains a review of Dr Georgia Henley's *Reimagining the Past in the Borderlands of Medieval England and Wales*, Oxford Textual Perspectives (OUP, 2024). As the reviewer makes clear, the book contains new analyses of a series of texts emanating from the March of Wales, highlighting their creation, context, and readerships and examining the cultural and legal frameworks in which they were written. As this work marks a significant contribution to the scholarship, we felt a review of it was all but essential.

The eighth volume of the Journal will be published this year too. The current schedule anticipates a publication date before the end of August. The overarching aim of this timeline is to ensure the publication of all subsequent volumes fall within the same year of their production.

Mortimer Matters

In 2025 we published four issues of *Mortimer Matters*, the society's newsletter, with issues in January, April, July and October – each coming out at the end of the respective month. *Mortimer Matters* is edited by Annie Garthwaite, supported by Elizabeth Holley as proofreader and by Ark Design, a professional design company.

Content continues to reflect the ongoing interests of the Society in the Mortimer family, the Welsh Marcher lordships, and relevant aspects of the medieval history of Wales and England. Our features have covered a wide range of interests, from Magna Carta and the Mappa Mundi to Yorkist iconography. We also focused on significant moments in Mortimer history, including features which celebrated the 600th anniversary of the last Mortimer. We also continued to focus on the research interests of MHS members, including our 2025 bursary recipients, Jonathan Moore and Tristan Wood.

We've continued to use *Mortimer Matters* as a vehicle to promote the Society's events programme, adding value by including interviews with or articles by some of our key speakers. For example, in our January 2025 issue PhD student and MHS Bursary recipient Gabriella Williams reprised themes from her autumn 2024 presentation about Yorkist propaganda and imagery. In April Dr Rachel Swallow wrote about Eleanor of Castille's impact on the March, which she discussed at our January conference. In July, the publication of an essay by Simon Egan coincided with his talk on the Mortimers in Ireland.

We continue to focus on books, with regular reviews and our 'bookshelf' feature, which gives a short review of new or upcoming titles. This is proving popular, not least because it often includes special discounts for Society members. We also reported on the launch event, hosted by the Society for *Heirs to the Princes: The Welsh Administrative Elite, from the Edwardian Conquest to the Black Death* by David Stephenson in our October issue.

As ever, we're keen to hear what members think about *Mortimer Matters* – what you'd like to see more of or what you think you'd like to contribute. The editor is always on the lookout for feature ideas and suggestions that will make this newsletter ever more valuable to its readers. So please don't hesitate to get in touch at mm@mortimerhistorysociety.org.uk.

Current and past issues of Mortimer Matters can be downloaded from our website at www.mortimerhistorysociety.org.uk/publications

5. *Studying the archaeology, structural fabric, heraldry, artefacts and documents related to the Mortimer family, and similar medieval Marcher families*.

Medieval Documents Research Group

Zoom meetings have continued this year, approximately every fortnight, when the subject of documents studied have mostly been Mortimer or local Marcher lords. Work has been completed on a translation of the Chronicle dealing with the Mortimers and which is held at Chicago University, though an attempt was not made to translate the whole work.

In March, the group is again meeting in Leominster for a weekend event when a variety of documents will be read. The weekend is important, as it allows extended practice, resulting in a noticeable improvement in people's ability to read old Latin documents. Work has also started on items concerned with the Wigmore Honor, since a start has been made in Leintwardine to begin work on the proposed Victoria County History (VCH) North-West Red Book.

Victoria County History of Leintwardine and Wigmore

After many preparatory meetings, a general meeting in Leintwardine was called for the evening of 15 October 2025 to announce the North-West Herefordshire project to the general public. Duncan James gave a talk about many of the buildings found there, while Professor Keith Ray spoke about the Roman remains there, especially those found in people's houses.

Following on from that meeting, there have been three meetings in Leintwardine concerned with explaining to people what topics are to be covered in the final book (known as the Red Book) and discovering what subjects people would like to research. The MHS has already indicated its willingness to help, especially via the Document Group that can translate early Latin documents. One has already been completed and another – a lengthy and difficult accounts roll for the whole of Wigmore Honor - is currently being undertaken. It is understood a study of Wigmore Parish will start in a year or two's time.

MHS Heraldry Study Group

The main development this year has been the creation of a freely available online 20-module step-by-step course on the language of heraldry. Describing a coat of arms accurately (or 'blazoning' it) can be a complicated business. It involves mastering traditional rules and practices that can sometimes seem rather arbitrary or odd. Even more challenging, perhaps, is the wealth of specialist vocabulary involved in heraldry. While one can never hope to know everything, there is a large body of regularly occurring words that the keen student needs to

master. Despite this major challenge, 18 members of the group signed up, with several still there at the end!

This year Hugh Wood presented another three heraldry lectures via Zoom. Two of these were units of the blazoning course, but the third was a detailed look at the heraldry of the Throckmortons of Coughton Court in Warwickshire. An additional five articles have been added our heraldry home page. One of these was about cadency differencing within the medieval Mortimer family, and another discussed the arms of Simon de Montfort.

The Powysland Club owns an impressive collection of funeral hatchments. These are currently displayed in Welshpool town hall, and in October a small group of enthusiasts attended an open day to view them. The Club's 14 hatchments date from the 18th and 19th centuries and represent 10% of the total number in Wales.

Programme of events scheduled for 2026

Sat. 31 January:	*Marcher Miscellany* (half-day online conference)
Sat. 28 March:	*AGM*, followed by the *Spring Soiree at Wigmore Abbey*
Sat. 16 May:	*Saints and Sinners of the March of Wales* (full-day hybrid conference)
Wed. 17 June:	*The John Grove Memorial Lecture* delivered by Professor Janet Burton
Sat. 11 July:	*Study Visit to Abbey Cwm Hir*
Fri. 28 August:	*Ludlow's Ultimate Medieval Power Couple* (half-day hybrid conference)
Sat. 10 October:	*1066 and the Bayeux Tapestry* (full-day conference)
Sat. 21 Nov:	*Medieval Manuscripts* (half-day online conference)

Other highlights to look forward to will be:

- the publication of the MHS Journal vol 7 by the end of March, with vol 8 to follow later in the year

- the programme of work with local schools has attracted new schools to join making it the largest yet

- plans are being developed for a series of events over the next four years to mark the 700th anniversary of the return, from his exile in France, to England of Roger Mortimer (d.1330) with Queen Isabella which led to the forced abdication of Edward II, the de-facto rulership of Roger Mortimer during the minority of Edward III, and his eventual demise.

Trustees of the Mortimer History Society, March 2026

Mortimer History Society - 1171392

Balance Sheet detailed

		As at 31/12/2025	As at 31/12/2024
Current assets			
	A01: Lloyds Acct	22,461	15,194
	A02: Float	65	65
	A03: Paypal Acct	1,000	6,758
	A04: Debtors	—	—
	A08: Shop Stock at Sale Price	1,077	1,293
	Total Current assets	**24,604**	**23,312**
Liabilities			
	L03: Cheques Not Yet Cleared	—	—
	Total Liabilities	**—**	**—**
	Net Asset surplus (deficit)	**24,604**	**23,312**
Reserves			
	Excess / (deficit) to date	1,292	4,285
	Z01: Starting balances	23,312	19,026
	Total Reserves	**24,604**	**23,312**

Represented by Funds

Unrestricted	18,385	17,953
Designated	2,065	1,912
Restricted	4,153	3,446
Endowment	—	—
Total	**24,604**	**23,312**

M G Beazley, Hon Treasurer, 26 January 2026

There may be minor discrepancies in the totals if the pence are not being shown

Mortimer History Society - 1171392

Balance sheet (Separate funds)
As at: 31 December 2025

	General Fund	Designated Funds	Restricted Funds	Endowment Funds	At 31/12/2025 £	At 31/12/2024 £
Current assets						
Stocks and work in progress	1,077	—	—	—	1,077	1,293
Cash at bank and in hand	17,308	2,065	4,153	—	23,527	22,019
Current assets	**18,385**	**2,065**	**4,153**	**—**	**24,604**	**23,312**
Net current assets less current liabilities	**18,385**	**2,065**	**4,153**	**—**	**24,604**	**23,312**
Total assets less current liabilities	**18,385**	**2,065**	**4,153**	**—**	**24,604**	**23,312**
Total net assets less liabilities	**18,385**	**2,065**	**4,153**	**—**	**24,604**	**23,312**
Represented by						
Unrestricted						
Unrestricted - General fund	18,385	—	—	—	18,385	17,953
Designated						
Designated - Events Cancellation Fund	—	1,000	—	—	1,000	1,000
Designated - Heraldry Fund	—	326	—	—	326	326
Designated - Medieval Documents Group Fund	—	738	—	—	738	585
Restricted						
Restricted - Bursary Fund	—	—	737	—	737	132
Restricted - Essay Prize Fund	—	—	1,014	—	1,014	—
Restricted - Mortimer History Trail	—	—	—	—	—	—
Restricted - Schools and Colleges Cancellation Fund	—	—	1,430	—	1,430	1,430
Restricted - Schools and Colleges Fund	—	—	971	—	971	1,884
Funds of the charity	**18,385**	**2,065**	**4,153**	**—**	**24,604**	**23,312**

There may be minor discrepancies in the totals if the pence are not being shown

Mortimer History Society - 1171392

Analysis of income and expenditure
Selected period: 01 January 2025 to 31 December 2025

	Unrestricted	Designated	Restricted	Endowment	Total This year	Total Last year
Income and endowments						
Donations and legacies						
101 - Subscriptions	6,201	—	—	—	6,201	6,368
102 - Donations	452	—	1,414	—	1,866	2,268
104 - Gift Aid	1,024	—	—	—	1,024	1,123
Donations and legacies Totals	7,677	—	1,414	—	9,091	9,760
Income from charitable activities						
212 - John Grove Lecture	—	—	—	—	—	958
201 - Living History Income	—	—	1,710	—	1,710	3,830
204 - Early Spring Conf Income	537	—	—	—	537	568
205 - AGM Income	996	—	—	—	996	—
206 - Spring Conf Income	2,400	—	—	—	2,400	2,555
207 - Summer Visit Income	1,179	—	—	—	1,179	1,099
208 - Autumn Symp Income	2,054	—	—	—	2,054	1,906
209 - Late Autumn Conf Income	418	—	—	—	418	756
211 - Other Talks and Tours Income	—	—	1,339	—	1,339	134
Income from charitable activities Totals	7,587	—	3,049	—	10,636	11,808
Other trading activities						
301 - Sale of Stock	388	—	—	—	388	773
Other trading activities Totals	388	—	—	—	388	773
Income and endowments Grand totals	15,652	—	4,463	—	20,116	22,342
Expenditure						
Raising funds						
E306 - Paypal Charges	102	—	—	—	102	84
E307 - Subs Refunds	14	—	—	—	14	35
E101 - Website Costs	450	—	—	—	450	247
E102 - Purchase of Stock	216	—	—	—	216	618
Raising funds Totals	783	—	—	—	783	985
Expenditure on charitable activities						
E214 - John Grove Lecture	—	—	—	—	—	230
E308 - Bursary Payments	—	—	2,000	—	2,000	2,000
E201 - Marketing	—	—	—	—	—	2,105
E202 - Living History Project Costs	—	—	2,622	—	2,622	3,307
E204 - Medieval Documents Group expenditure	—	346	—	—	346	331
E205 - Early Spring Conf Costs	75	—	—	—	75	—
E207 - Spring Conf Costs	1,605	—	—	—	1,605	2,266

There may be minor discrepancies in the totals if the pence are not being shown

	Unrestricted	Designated	Restricted	Endowment	Total This year	Total Last year
E208 - Summer Study Visit Costs	495	—	—	—	495	671
E209 - Autumn Symp Costs	2,215	—	—	—	2,215	733
E211 - Newsletter Costs	1,818	—	—	—	1,818	2,104
E212 - Mortimer Journal Costs	4,750	—	—	—	4,750	1,050
E213 - Other Talks and Tours	209	—	148	—	357	1,140
Expenditure on charitable activities Totals	11,168	346	4,770	—	16,286	15,941
Other expenditure						
E206 - AGM Costs	1,192	—	—	—	1,192	530
E301 - Governance Costs	—	—	—	—	—	100
E302 - Trustee Expenses	172	—	—	—	172	—
E303 - Insurance Costs	90	—	—	—	90	180
E304 - Miscellaneous Costs	200	—	—	—	200	162
E305 - Software Costs	100	—	—	—	100	155
Other expenditure Totals	1,754	—	—	—	1,754	1,129
Expenditure Grand totals	13,706	346	4,770	—	18,824	18,056

There may be minor discrepancies in the totals if the pence are not being shown

CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A Independent Examiner's Report

Report to the trustees	Mortimer History Society		
On accounts for the year ended	31th December 2025	**Charity no (if any)**	1171392
Set out on pages	(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 31/12/2025DD / MM / YYYY.

Responsibilities and basis of report

As the charity's trustees, 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 all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. *Delete* [ ] *if not applicable.*

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

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report 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:	N. J. Lawrence	**Date:**	03/03/2026
Name:	Natasha Jayne Lawrence		
Relevant professional qualification(s) or body			

(if any):	
Address:	41 Westcroft
	Leominster, Herefordshire
	HR6 8HF

Section B Disclosure

Only complete if the examiner needs to highlight material 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.