REPORT OF THE TRUSTEES

FOR THE YEAR ENDED 31 MARCH 2026

LEGAL AND ADMINISTRATIVE DETAILS

Charity Name: JOHN LEE CHARITABLE FOUNDATION

Charity Registration Number: 1209636

Date of Formation: 16 August 2024

Principal Office: Coombe Barton
Shobrooke
Crediton
Devon
EX17 1BS

Trustees

The Trustees who served during the period are as follows:

Matthew Crooke
John Lee OBE DL
Victoria Leeming (resigned 17th March 2026)
Peter Morris
Joanna Robson

Bankers

National Westminster Bank
250 Bishopsgate
London
EC2M 4AA

Solicitors

Tozers LLP
Broadwalk House
Southernhay West
Exeter
EX1 1UA

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing Document

The charity is a CIO - FOUNDATION as set out in its Governing Document.

Trustees

The trustees are as listed and have managed and administered the charity since inception.
All trustees give their time voluntarily and received no benefits from the charity.

OBJECTS AND ACTIVITIES

1) To advance in life and help young people, in particular those living in rural communities, by assisting in the provision of: A) support and activities which develop their skills, capacities, and capabilities, self-reliance and individual responsibilities to enable them to participate in society as mature, caring and responsible individuals: and (B) recreational and leisure time activities provided in the interest of social welfare, designed to improve their conditions of life: and (2) to further such other purposes which are charitable according to the laws of England and Wales(in particular, but not exclusively, for the benefit of people in Devon) as the charity trustees see fit from time to time.

Achievement

The charity being newly formed made one financial donation during the financial year.

FINANCIAL REVIEW

The charity received £35883.36 income during the financial year, principally as donations. Total expenditure was £250.00

At the year end the charity held £55,638.36 in bank accounts and cash deposits.

Principal Funding Source

The principal funding source for the charity are donations.

Investment Policy

The trustees have agreed that their current priority is to grow the charitable fund.

Related Party Transactions

There have been no related party transactions.

Safeguarding

There are no safeguarding issues that affect this charity.

JOHN LEE CHARITABLE FOUNDATION – A registered charity in England and Wales (Number 1209636).

Statement of Account for the year ended 31 March 2025

Income			**Expenditure**
Donations	£ 35,250.00	Grants	£ 250.00
Interest	£ 633.36	Charity Expenses	£ 0.00
Total	£ 35883.36	Total	£ 250.00

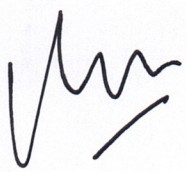
Balance Sheet

Investments

Balance at bank	£	55,638.36

Approved by the trustees on 28 August 2026

Signed as approved:



CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A Independent Examiner's Report

Report to the trustees

Charity Name
John Lee Charitable Foundation

On accounts for the year ended	Charity no (if any)
31 March 2026	1209636

Set out on pages

1 to 3
(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 DD / 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: [signature] **Date:** 16/9/26

Name: SHAUN GILLANDERS

Relevant professional qualification(s) or body ICAEW.

(if any):	
Address:	c/o MCLE AVON TRADING LTD JOSEPH LOCKE WAY CREDITON

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.	None