

AUKANA TRUST

2025



ANNUAL REPORT

LEGAL AND ADMINISTRATIVE DETAILS

The Aukana Trust is a religious charity whose object is the promotion of the Buddhist Faith. It was established by a Deed of Trust on 17 June 1985 and registered with the Charity Commission (registration number 326938) on 19 September 1985.

The Spiritual Head of the charity is Paul Harris.

Trustees:

David Gilbert, Chairman
Paul Harris
Brother Nigel Skene
Anda Lutkevics
Peter Case
Elizabeth Kemp

As Spiritual Head of the Aukana Trust, Paul Harris has the right to nominate all new trustees. Also, a new trustee may be appointed by a resolution of a meeting of the trustees.

Address of the charity:

9 Masons Lane, Bradford on Avon, Wiltshire, BA15 1QN
telephone: 01225 866821
e-mail: info@aukana.org.uk Website: www.aukana.org.uk

Addresses of monasteries run by the charity:

The Monastery of Absolute Harmony,
9 Masons Lane, Bradford on Avon, Wiltshire, BA15 1QN

The Monastery of Infinite Compassion,
10 Masons Lane, Bradford on Avon, Wiltshire, BA15 1QN

Address of the meditation centre administered by the charity:

The House of Inner Tranquillity,
9-10 Masons Lane, Bradford on Avon, Wiltshire, BA15 1QN

Address of teacher's accommodation administered by the charity:

8 Masons Lane, Bradford on Avon, Wiltshire, BA15 1QN

Bankers:

HSBC Bank plc, 46 Fore Street, Trowbridge, Wiltshire, BA1 4 8EL

Solicitors:

Bishop, Longbotham and Bagnall, 3 Church Street, Bradford on Avon, Wiltshire, BA15 1LR

Independent Examiner:

Stephen Passfield, 5 Clearwood, Dilton Marsh, Nr Westbury, Wiltshire, BA13 4BD

AIMS AND ORGANISATION

To quote from the Trust Deed the object of the charity is *'to promote the Buddhist Faith in all aspects including both meditative and theoretical aspects and in furtherance of this object but not further or otherwise:-*

a) To provide facilities for the general public to attend lectures and classes concerning the Buddhist Faith;

b) To provide libraries and facilities for writing translating printing publishing and selling books and pamphlets; and

c) To establish centres schools colleges institutions monasteries nunneries communities and retreats in the United Kingdom and elsewhere and to provide such support as may be necessary for persons attending the same for the purpose of studying the Buddhist Faith.'

REVIEW OF ACTIVITIES AND ACHIEVEMENTS

The Aukana Trust has regard for the Charity Commission's guidance on public benefit in the preparation of this report.

At the House of Inner Tranquillity Meditation Centre and associated monasteries in Bradford on Avon the Trust provides facilities for instruction in the teaching of the Buddha. There are two seasons of weekly meetings held at the Centre which are attended by local members. Online Zoom meetings were introduced in the spring of 2023 to enable members of the group who live at a distance to partake in Q&A sessions with Paul Harris. These are open for anyone on the Trust's email list to attend.

Following are activities during the year ending 30 September 2025:

- 40 weekly group meetings held with an average attendance of 22 people.
- 16 fortnightly Zoom meetings were held with an average attendance of 32 people. Of the 84 different people attending 36 were local and 48 live at a distance.
- A full schedule of retreats was on offer with 11 6-day silent, 4 6-day integrated and 6 weekend retreats completed. 86 places were filled.
- 15 new videos were added to the HoIT YouTube channel. The channel had 162 videos in total with 5,137 views and 85 new subscribers in the year.
- 14 Podcasts were uploaded during the year making a total of 183. There were 5,533 listens during the year.
- The HoIT Facebook page had 680 followers at year end.
- The Friends of HoIT Facebook page – a group administered by meditators who post regularly – had 785 members at year end.
- The biennial Open Day was held in June 2025 with some 150 members and guests visiting the Centre.

All the media platforms can be reached from the Aukana Trust web site. The Trust's 10 published book titles can also be ordered through the web site via an online shopping cart facility or by contacting the Trust directly. These books are now available free of charge upon request. Donations towards them are welcome.

On 30 September 2025 one monk was in residence fully supported by the Trust. The Trust provided financial support for Paul Harris as meditation teacher as authorised in section 14 of the Trust Deed. The Trust also supported for part of the year a full-time lay student and trustee, Anda Lutkevics, who has been in residence since February 2000 and works as housekeeper and administrator.

In keeping with Buddhist traditions, no charge is made for any of the facilities offered by the Trust. The major part of the Trust's income derives from donations. This financial year roughly 59% of this is made up of various miscellaneous donations including monthly donations from 65 meditators and supporters which contributed £23,105. Donations received for residential meditation courses contributed 21.5% and a Gift Aid tax reclaim contributed 8.7% of the total income.

For meditators attending and practising at the Centre, an integral part of the Buddha's training is the development of generosity, service and friendliness in all aspects of life. Over the year the Trust has received various non-financial donations, particularly in respect of food and household goods as well as assistance from meditators in the day-to-day upkeep of the Centre.

RESERVES POLICY

To reflect the high potential costs of repairs to the buildings the Trustees aim to maintain reserves at a minimum level of 2 times the annual expenditure with the exclusion of exceptional items. The policy is reviewed annually. At 30 September 2025 the Trust had cash reserves of £145,007. Total expenditure for the year was £88,191 which included exceptional expenditure to update fire safety installations of some £31,228. Without the exceptional items the reserves are about 2.5 times expenditure.


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Trustee


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Trustee

.....12th March 2026.....

Date 12th March 2026



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

AUKANA TRUST

**On accounts for the year
ended**

30-9-2025

**Charity no
(if any)**

326938

Set out on pages

1-3

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended

**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").

**Independent
examiner's statement**

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.

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:

Stephen Passfield

Date:

17/12/25

Name:

STEPHEN PASSFIELD

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

Address:

S. CLEARWOOD, DLTON MARSH,
WESTBURY, WILTSHIRE
BA13 4BD

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.

No matters of concern identified.

AUKANA TRUST (Charity no 326938) RECEIPTS & PAYMENTS, 1.10.2024 to 30.9.2025

RECEIPTS	24-25	23-24	PAYMENTS	24-25	23-24
Donations			Monasteries & Meditation Centre		
Donations - General	47,760.36	30,140	Repairs & maintenance, servicing	3,051.62	30,644
Donations - Meditation courses	17,277.36	16,525	Electricity	2,602.70	2,840
Donations - Workshops	0.00	275	Gas	2,220.54	2,292
Income Tax recovered	7,028.50	10,946	Water	1,637.82	1,890
Interest	6,707.81	5,016	Council Tax	7,247.39	6,895
	<u>78,774.03</u>	<u>62,802</u>	Insurance	5,254.53	4,837
			Gardens	556.30	1,743
				<u>22,570.90</u>	<u>51,141</u>
Receipts from operating activities			Monastic & Retreats		
Aukana book and shop sales			Food & household goods	6,059.11	5,540
Sales of Aukana published books	715.86	515	Monastic medical expenses	191.60	515
Shop sales of purchased books, incense etc.	292.00	150	Monastic uniforms	0.00	98
	<u>1,007.86</u>	<u>665</u>		<u>6,250.71</u>	<u>6,153</u>
Fund raising/Other receipts			Communications & Administration		
Library fines	56.50	29	Audio/Visual teaching aid costs	266.80	254
Open day tea stall	228.30	0	Printing, stationery, computer/network costs	674.78	785
Garden plant sales	261.00	0	Telephone and broadband	578.58	476
	<u>545.80</u>	<u>29</u>	Postage	48.80	63
			Miscellaneous (subscriptions/publicity)	160.00	65
			Bank, PayPal etc. charges	92.35	84
TOTAL RECEIPTS	<u><u>80,327.69</u></u>	<u><u>63,596</u></u>		<u>1,821.31</u>	<u>1,727</u>
			Transport		
			Motor vehicle: running expenses	1,927.68	1,677
				<u>1,927.68</u>	<u>1,677</u>
			Support		
			Teachers' support	21,498.00	20,004
			National Insurance contributions	824.20	824
			Residential lay students' support	990.00	1,980
				<u>23,312.20</u>	<u>22,808</u>
			Costs of sales and library facilities		
			Purchases for the shop	168.44	94
			Library purchases	0.00	82
				<u>168.44</u>	<u>176</u>
			Sub-Total	<u>56,051.24</u>	<u>83,681</u>
			Other payments - functional equipment		
			Fire and Asbestos assessments	1,104.00	1,104.00
			Fire alarms, emergency lighting and fitting	21,600.00	21,600.00
			Fire doors, fixtures and fitting	8,523.73	8,523.73
			Equipment: Electric fire, tumble dryer, printer	613.99	613.99
			Sundries: Wall light, bin, kettle	93.92	192
			Garden equipment: Cordless lawnmower	204.00	19
				<u>32,139.64</u>	<u>2,543</u>
			TOTAL PAYMENTS	<u><u>88,190.88</u></u>	<u><u>86,223</u></u>
RECONCILIATION					
TOTAL RECEIPTS	<u>80,327.69</u>	<u>63,596</u>			
less TOTAL PAYMENTS	<u>88,190.88</u>	<u>86,223</u>			
NET RECEIPTS	<u>-7,863.19</u>	<u>-22,628</u>			
plus OPENING CASH FUNDS 1.10.2024	<u>152,870.15</u>	<u>175,498</u>			
CLOSING CASH FUNDS 30.9.2025	<u>145,006.96</u>	<u>152,870</u>			
Reconciled to Assets and Liabilities schedule					

AUKANA TRUST (Charity no 326938) STATEMENT OF ASSETS & LIABILITIES, 30.9.2025

CASH FUNDS			
Bank balances	18,335.09	17,314	
Building Society balance	46,023.65	54,849	
1 Year Fixed Rate Bond	80,000.00	80,000	
Petty cash	648.22	697	
PayPal Business	0.00	0	
Amazon Seller Account	0.00	11	
Total reconciled to Receipts and Payments schedule	145,006.96	152,870	
OTHER MONETARY ASSETS			
Publishing debtors	49.70	19	19
ASSETS USED BY THE CHARITY			
Freehold property	389,000.00	389,000	
Improvements to above	54,707.57	54,708	
	443,707.57		443,708
OTHER ASSETS USED BY THE CHARITY			
Motor vehicle			
Furniture & equipment			
ASSETS AVAILABLE FOR SALE			
Aukana published book stock	16,890.23	17,336	
Shop stock - books, incense, Buddha figures and cards	180.03	150	
	17,070.26		17,486

Comparison as at 30.9.2024

Actual values

Values at cost

NOTES TO THE ACCOUNTS

The accounts have been prepared entirely as Receipt and Payment accounts with an accompanying statement of Assets and Liabilities in accordance with Charity Commission Guidance. An Appendix showing details of the Aukana book movements has been provided for the benefit of the trustees.

The funds of the Charity are all unrestricted funds so all financial information has been given in total.

RECEIPTS & PAYMENTS

RECEIPTS

Donations - Meditation Courses: The donations from those attending meditation courses have the portion above cost used in the tax reclaim according to the rules of Gift Aid – our present suggested donation is £30 per meditator per day.

Donations - General: Tax is reclaimed on donations of any value where a Gift Aid Declaration has been signed by the donor. We advise donors that if they wish to give regularly, they can set up a monthly standing order and sign a Gift Aid declaration.

Publishing: To date, the Trust has published ten books.

PAYMENTS

SUPPORT: Teachers

The Trust has provided financial support for Paul Harris.

SUPPORT: Residential Lay Student

One residential student received an allowance for part of the year.

REPAIRS AND MAINTENANCE: One off safety assessments were carried out for £1,104 leading to a wireless fire alarm and emergency lighting system being installed throughout nos. 9, 10 and 10a for £21,600 and fire doors being fitted in essential areas for £8,524.

STATEMENT OF ASSETS AND LIABILITIES

ASSETS USED BY THE CHARITY

Freehold Property: The Trust owns three properties:-

9 Masons Lane, Bradford on Avon bought in 1986 for £79,000.

10 Masons Lane, Bradford on Avon bought in 1993 for £200,000.

8 Masons Lane, Bradford on Avon bought in 1997 for £110,000.

OTHER ASSETS

Publishing Debtors and Stocks: See Statement of Assets and Liabilities and Appendix.

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Trustee

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Trustee

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 12th March 2026

Date 12th March 2026

APPENDIX

AUKANA TRUST: PUBLISHING ACCOUNT 2024-2025

	508	880	1151	1056	722	870	1146	1360	1481	1542	Totals for 2024-2025	Totals for 2023-2024
	Modern Buddhism	Life as a Siamese Monk	Buddhist Character Analysis	Unfolding of Wisdom	Buddhism in a Foreign Land	The Plain Facts	Inner Tranquility	Meditation Retreat	Purpose of Life	Postcards from Beyond		
Opening physical stocks 1/10/24	1.40	1.85	1.35	1.77	1.92	1.37	1.78	1.57	1.86	1.34	10716	10787
Cost/book £	711.20	1,628.00	1,553.85	1,869.12	1,386.24	1,191.90	2,039.88	2,135.20	2,754.66	2,066.28	£17,336.33	£17,445
Stock value £	21	20	19	22	16	25	32	20	20	88	283	58
Less Net sales for the year												
Less Donations												8
Plus returns												0
Plus stock gains							4					2
Less stock reductions			4							5		7
Closing physical stocks 30/9/25	487	860	1132	1030	706	845	1118	1340	1461	1449	10428	10716
Cost/book £	1.40	1.85	1.35	1.77	1.92	1.37	1.78	1.57	1.86	1.34		
Stock value £	681.80	1,591.00	1,528.20	1,823.10	1,355.52	1,157.65	1,980.04	2,103.80	2,717.46	1,941.66	£16,890.23	£17,336

Summary of Publishing income for the year

	2024-2025	2023-2024
	£	£
Sales receipts for the year	715.86	514.66
Less opening debtors	18.90	0.00
Plus closing debtors	49.70	18.90
	<u>30.80</u>	<u>18.90</u>
Gives actual receipts for the year	746.66	533.56

Deduct cost of sales - calculated by Publishing costs

Value of opening stock	17,336.33
Less value of closing stock	16,890.23
	<u>446.10</u>
Net receipts for publishing for the year	<u>300.56</u>
	<u>108.58</u>
	<u>424.98</u>

At a meeting of the trustees on 5th December 2024 it was decided that Aukana Published books should be made available free of charge. Donations received are allocated to publishing. The shopping cart on the web site, due to limited sales there, has retained the book pricing and discount terms.