

**Sister Anna Chaplaincy Charitable Trust**  
**Annual Report and Financial Statements**  
**For the Period Ended 31 March 2022**  
**Charity Registration Number: 107366**

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**Annual Report of the Trustees of Sister Anna Chaplaincy Charitable Trust  
for the year ended 31 March 2022**

**INTRODUCTION**

This is the annual report for Sister Anna Chaplaincy Charitable Trust for the year ended 31 March 2022.

This format is in accordance with the requirements of the "Accounting and Reporting by Charities: Statement of Recommended Practice Applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK & Republic of Ireland (FRS 102)" ("The Charity SORP").

**ADMINISTRATION DETAILS**

Contact us:

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BT8 6SA

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**TRUSTEE ARRANGEMENTS**

Trust Members are as follows:

Mrs Amanda McNamee (Chair)  
Mr Gerard Sowney  
Mr Timothy Andrew Woods  
Mrs Mary Mackey (Treasurer)

The Trustees have delegated responsibility for the on-going management of funds to the Treasurer, Mrs Mary Mackey.

The Trustees employed the following professional advisors during the period:

Accountants: CavanaghKelly. Northland Row, Dungannon, Co. Tyrone.

Investment Managers: Davy Private Clients UK, Donegall House, 7 Donegall Square North, Belfast.

## **STRUCTURE, GOVERNANCE AND MANAGEMENT**

The Sister Anna Charitable Trust (SACT) was a restricted Capital Fund set up with IEF, by the late Sister Anna, in 2004. The interest from the Trust was used to contribute to the support of Lagan College Chaplains. On 2 February 2021, with agreement of the former Trustees of the Sister Anna Charitable Trust, the IEF transferred this restricted Capital Fund to a newly formed Charity, The Sister Anna Chaplaincy Charitable Trust, (SACCT) to be administered by Lagan College Limited.

The Trust Board are recruited by Lagan College Limited. The Board of Trustees is made up of three Directors and the Treasurer of Lagan College Limited. Each Trustee may serve three years after which period they may put themselves forward for reappointment for a second further term, however no member may serve longer than six years or, if resolved by all the then Directors of Lagan College Limited in accordance with the Articles of Association, nine years continuously.

The Trustees will meet on an annual basis to agree the broad strategy and areas of activity for the Fund including: fundraising, investments performance, reserves, risk management and other policies and procedures.

This meeting may occur via video conferencing.

The Board of Trustees will continue to apply the interest from the funds for the purpose intended by the founders of the Sister Anna Charitable Trust.

## **ACHIEVEMENTS AND PERFORMANCE**

The Sister Anna Chaplaincy Charitable Trust was set up on 6 March 2020. No transactions occurred until 2 February 2021 when the Sister Anna Chaplaincy Charitable Trust portfolio was opened and funds transferred from IEF.

The trust funds are managed by Davy Private Clients UK.

The total transfer value was £189,542

During the period from 1 April 2021 to 31 March 2022 the fund earned £8,891.

Market Performance has led to an increase in the capital sum from £191,044 to £200,435 at 31 March 2022.

### **Public Benefit Statement**

The Trustees of Sister Anna Chaplaincy Charitable Trust confirm that they have complied with their duty under section 4(6) of the Charities Act (Northern Ireland) 2008 to have regard to the Charity Commission for Northern Ireland's guidance on public benefit and that the public benefit requirement has informed the activities of the charitable company in the period ended 31 March 2022.

**Annual Report of the Trustees of Sister Anna Chaplaincy Charitable Trust (Continued)**  
**for the year ended 31 March 2022**

The direct benefits flowing from this purpose include the education of children at Lagan College by providing greater opportunities for the students to learn more effectively by providing a safe space to nurture the minds, hearts and spirits of the students. The advancement of religion, the advancement of human rights, conflict resolution or reconciliation or the promotion of religious or racial harmony and equality or diversity. The beneficiaries are the children, parents and staff of Lagan College Belfast.

This report was approved by Trustees on 28 September 2022 and signed on its behalf by:

Mrs Amanda McNamee  
TRUSTEE



Registered office:

Sister Anna Chaplaincy Charitable Trust  
44 Manse Road  
Belfast  
BT8 6SA

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