

# THE WESTHORPE TRUST

## **REPORT TO THE ANNUAL PARISH MEETING – MAY 2026**

Most of the Trust's income derives from its investments and it follows the advice of its independent financial adviser, Nathan Munt of Brookes Financial. The portfolio is currently invested in ethical funds by Brooks Macdonald Investment Management and follows the objectives laid down in the Trust's Investment Policy Statement. The value of investments has recovered slightly from last year and is now on a slight upward trend.

During the past twelve months over £9,200 has been distributed to Westhorpe residents covering personal grants, academic and education, family, heating and transport grants.

- A grant was made to the Rural Coffee Caravan to help them continue their invaluable work of bringing people in villages together over coffee and cake and to show how much Westhorpe appreciates their work.

There is information about the history of the Trust and how it works on the Westhorpe Village website. There is also information about how to apply for grants, a downloadable application form and information about how to contact Trustees. The same information is available inside the Village Hall and in the Parish magazine.

The Westhorpe Trust is registered with the Charity Commission, Charity number: 263332 and its details and financial overview may be viewed on the website of the Register of Charities: [www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)

All requests for assistance from the Trust are treated with the utmost confidence and may be addressed to me – details below – or any of the Trustees:

Mr Steve Christian [Chairman]  
Mrs Rosemary Mees [Churchwarden]  
Mrs Gilly Christian  
Mrs Amanda Rudd  
Revd Catriona Brinkley

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Claire Barker  
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