# Making people's lives better

The Equilibrium Foundation report September 2021 - August 2022



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# Introduction from Debbie Jukes



The Equilibrium Foundation started in 2010 to make people's lives better. This year we have continued to do this by supporting many charitable causes, with a particular focus on the North West of England.

Over the past 12 months, we have seen significant challenges both nationally and globally, including the Taliban's ascent to power in Afghanistan, the continued coronavirus pandemic, Russia's invasion of Ukraine and the cost of living crisis. During this time, we have donated

£199,187, which has allowed us to support many causes that help those directly affected by these challenges when they need it the most.

I am delighted to share that we have raised £162,682 over the past year, and I would like to express my thanks to everyone who has supported the Equilibrium Foundation over the last 12 months. As we look forward to the next year, we aim to bring our grand total of money raised to £1,000,000, so we can reach even more charitable causes than ever.

#### **Debbie Jukes**

Chair of the Equilibrium Foundation

# Making people's lives better



raised for good causes this year



**89** charity days were used by the team

grants were given to local charities as part of our community support scheme

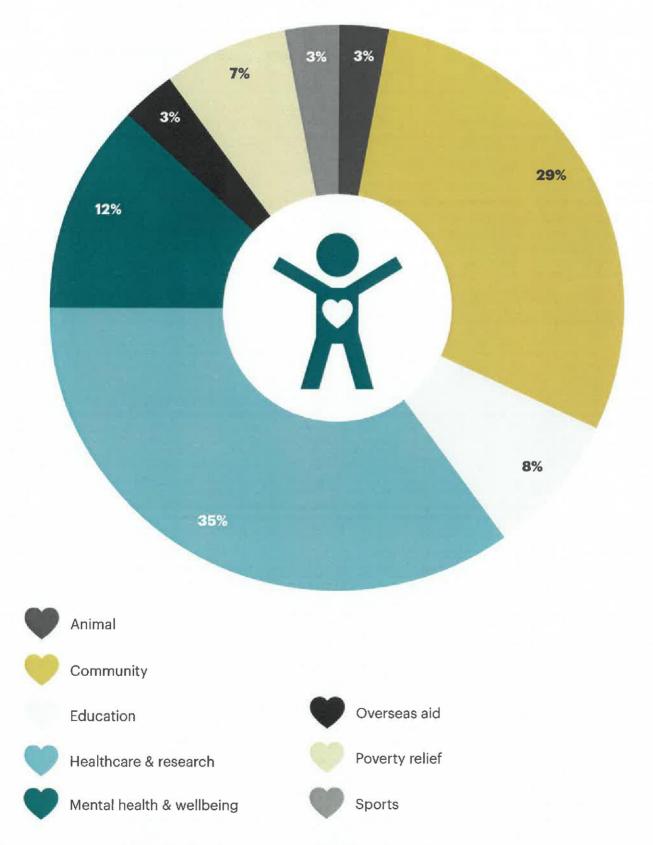


£3,755 raised from team give as you earn donations

charities nominated by our team received a share of

£65,000

# Breakdown of sectors



# How we made a difference

We supported over 77 charities this year who are all doing incredible work in our community. These are just some of the ways we have been able to make an impact.

# Libby

We have continued to invest in our financial skills project, 'Libby's Big Aeroplane Adventure' which is designed to provide teachers with the materials they need to effectively teach KS2 children about finance in a fun, engaging way.

The project has continued to grow this year and we have been able to reach over 550 children with our free financial literacy workshops. Towards the end of the year, we put plans in place for a more targeted approach to reaching primary schools local to us and we have already begun to make new connections with area coordinators, and we look forward to sharing the results from this in next year's report.



"A very engaging learning session that was purposeful to the curriculum. The 'real life' storytelling made this more relevant to pupils which allowed for discussions and development of numeracy" Claire Carter, Ysgol Penmorfa

# **Portugal peddlers**

Three Equilibrium advisers completed a mammoth cycling challenge across Portugal's mountains to raise money for three charities: Reuben's Retreat - supports families of complexly poorly children and families of child loss, Claire's House – a children's hospice and My Name'5 Doddie which seeks to help sufferers of motor neurone disease.

Andrew Hirst, Jason Lowe and David McKendrick spent six days cycling from Chaves in the country's north to Faro in the south – a route that totalled 456 miles, reaching elevations of 960m, in temperatures up to 32 degrees.

Their challenge raised a total of £21,000 which was split equally between the three charities. Andrew Hirst, Financial Planner at Equilibrium Financial Planning, said: "We are truly proud of our cycling achievement, but knowing we've made a difference to each charity is exceptionally humbling. The pandemic and lockdowns had such a detrimental impact on charities' funds and being able to play a part in supporting them made the hills and flat tyres worth it."



## Winter fuel fund

We launched this campaign in 2019 with our clients to enable them to easily donate their winter fuel payment to help those that need it most. The Equilibrium winter fuel fund was created so clients could support the elderly and most vulnerable in our local area so that they didn't have to make the impossible choice between heating or eating over the winter.

Donations meant we could support AGE UK Stockport with their Winter Warmth campaign; Wishing Well with their delivery of services to vulnerable elderly people across South Cheshire; and Friends of the Elderly where our grant was able to help 12 older people who were struggling to cope.

"Thanks to your ongoing support we can continue bringing warmth, comfort and joy to older people living in poverty." Friends of the Elderly



## **Party for Afghan children**

In August 2021, 19 planes with Afghan nationals on board arrived at Manchester Airport with their lives in the bags they carried. Following this many of the people on board continued to live in a hotel at the airport including 72 children aged under 10.

When Head of Marketing Strategy, Rachel Griffiths, learned of this she reached out to the council's dedicated team who were helping them build their lives here to offer to arrange an evening where the children were given a chance to play and have fun and have a party at a soft play centre. Rachel was told that the children hadn't had anything like this since they arrived and very little fun during the last 18 months in Afghanistan.

This was made possible with sponsorship from the Equilibrium Foundation and another generous sponsor.

## **Wilmslow Youth**

Wilmslow Youth began in 2016 by bringing together teenagers, parents, teachers, police, community groups and charities to have one big community conversation to help them understand the self-expressed needs of our local young people. The charity now offers young people free counselling, mentoring, wellbeing workshops and alternative education programmes.

The need for this kind of support is now greater than ever with referrals for their one-to-one support service doubling since the pandemic. The Equilibrium Foundation has supported Wilmslow Youth with an ongoing donation of £1,000 a month for a year to support them in keeping waiting times low. The money has gone directly to funding an expansion of their mentoring and wellbeing workshops. It's meant that young people can address difficulties before they reach a point of crisis.

## **Christmas lunches**

Each year Equilibrium host three client Christmas lunches. Clients are invited to take part in a prize raffle to raise money for The Toy Appeal, who provide toy sacks for underprivileged children across Manchester and Cheshire who would otherwise not receive a gift at Christmas. The charity has seen demand increase year on year, so we are thrilled to have raised £16,067 through client donations and matched funding from the Foundation.

## **Support for Ukraine**

Siobhan's Trust provide supplies of food, medical equipment and hygiene products to refugees crossing the border from Ukraine to Poland. Since the invasion of Ukraine they have set up a static feeding station on the Polish/Ukrainian border and through increasing support they have been able to provide a mobile service with food trucks venturing out across the whole country with the capacity to feed up to 4,000 refugees per day. The Equilibrium Foundation have supported Siobhan's Trust with an ongoing donation of £1,500 a month throughout the year and fundraising event sponsorship.

## **East Cheshire Hospice**

#### Hospice to hospice half marathon

A number of activities took place during the year to help an organisation close to the hearts of many of our clients and team. Three members of the Equilibrium team, Kelly Eyton-Jones, Lucy Woolrich and Sarah Hammond took on the hospice to hospice half marathon to raise money for the hospice. Their walk from Mere to Macclesfield raising a fantastic £2,325.50.

#### **Born Survivor**

Ten members of our Equilibrium team took on the Born Survivor challenge. The action-packed 5km and 10km courses included multiple military-style obstacles, a sprinkling of madness and lots of mud. The team raised a whopping £1,991, which was matched by The Equilibrium Foundation, giving a grand total of £3,982 to East Cheshire Hospice.

#### **Christmas tree collection leaflet drop**

Every year the hospice provides a Christmas tree collection service, which helps people discard their Christmas trees in exchange for a donation. This year some of the team used one of their three paid charity days delivering leaflets to around 3,000 residential houses in Congleton to promote this.

#### **Christmas jumper day and raffle**

This year the team got into the festive spirit by wearing their favourite Christmas jumper and having a raffle for to raise £578 for East Cheshire Hospice.

#### **Toiletry donations**

Over Christmas many people are given toiletry gifts that are not needed and often go unused. Noticing this Client Manager, Deborah Start, encouraged the team to donate any unwanted toiletries to patients. The box where donations could be left soon filled up and was delivered to East Cheshire Hospice in February.

# £65,000 to local charities

The Equilibrium team nominated eight charities to receive a share of a £65,000 donation.

# £20,000 The Booth Centre

The Booth Centre is a community centre that supports people affected by homelessness, it provides a warm welcome, an opportunity to belong, to gain a purpose and rebuild lives.

Their grant was spent on delivering a range of services to people affected by homelessness including: an advice referral clinic, a café that serves hot breakfasts and lunches every week day plus health and wellbeing programmes.

"We are incredibly grateful to The Equilibrium Foundation for its support of Booth Centre, ensuring that we can continue to support those affected by homelessness at a time when our services are being called upon by increasing numbers of people."

# £10,000 Little Hearts Matter

Little Hearts Matter is the only national UK charity offering help to anyone affected by the diagnosis of single ventricle heart condition.

Their grant was spent on providing a comprehensive support service for families affected by half a working heart. This includes their support line, online group, information publications available from the point of diagnosis (often antenatal) and an open day of educational sessions, networking and friendship for families.

"Living with a life-limiting condition is incredibly isolating and difficult, and it's only thanks to the support of organisations such as The Equilibrium Foundation that we can continue to ensure that families have somewhere to turn."

# £10,000 Rekindle

Rekindle is a supplementary school for students in South Manchester, who have been let down by the mainstream system, and led by young people who know what their peers need.

The grant enabled them to employ a Referral Lead to help them build relationships with parents, schools and relevant agencies, which is key to the success of their project.

"Donations like this are key to our mission to expand the dream school concept across the country and provide education that is accessible to all."



# £5,000 Emmeline's Pantry

Emmeline's Pantry provide women in Manchester with access to food, toiletries, baby equipment and clothes. The grant was used to stock up on premium food items and ensured they could support all the referrals we received so they didn't have to turn anyone away.

# £5,000 Millie's Trust

Millie's Trust aim to make first aid training available to everyone. They will be using their funding to enable first aid training to be readily available for minimum costs, in as many places as possible.

# £5,000 Friends for Leisure

Friends for Leisure helps disabled young people in Cheshire East to enjoy friendship and leisure. This grant helped them cover a variety of costs including volunteer expenses, website development, direct service delivery and marketing our services.

# £5,000 Wingate Special Children's Trust

Wingate Special Children's Trust is a residential centre based in Nantwich and caters for those with disabilities or who are disadvantaged. As well as receiving this grant, some of the Equilibrium team volunteered at the centre for a charity day where they helped out with decorating their outdoor space, café and office.

# £5,000 Norbrook Youth Club

Norbrook Youth Club offers weekly sessions to young people in a safe environment. The grant allowed them to buy new games consoles and games, resources for their art room and outdoor sports equipment. The most important investment has been the CCTV which has been a fantastic help in protecting the premises and those using it.

# **Community support scheme**

Our community scheme provides grants of up to £500 to three charities each quarter. Here are this year's winners...

Live! Cheshire	Charitable Trust	MedEquip4Kids
East Cheshire Musical	Stroke Information	Bare Necessities Toiletry Bank
Theatre Company	Elsie Ever After	TOHELFY DATIK
<b>Prevent to Protect</b>		Press Red
	Just-Ice Poynton	
Speed of Sight		Croftwood Care
	Daisy's Dream	Home
Children Today		



"Press Red is extremely grateful for the grant. This will help us to continue to present cutting edge programmes that fulfil our vision which is of a world in which no individual, society, or culture accepts abuse and violence against women." Rosemary Hack, CEO of Press Red

"This grant will allow us to continue to reach out to the very many local people facing various economic challenges including hygiene poverty. Giving someone the basic toiletries, we all take for granted works on so many levels. Being clean assists mental health, dignity and confidence." Wendy Hobson, Chairperson of Bare Necessities Toiletry Bank





"This money will help MedEquip4Kids to provide pulse oximeters to the Children's Community Team at the hospital who are hard at work supporting poorly children who have been discharged home on oxygen."

Hayden Cowap, Corporate Fundraiser for MedEquip4Kids

# Charity champion spotlight: Aleesha Shah



Aleesha, Client Manager at Equilibrium Financial Planning has a passion for making a positive impact in the community. As the team leader of Equilibrium's Charity Champions, she has successfully organised numerous volunteer days and led fundraising initiatives for various charities.

Our purpose at Equilibrium is to make people's lives better and we therefore strive to make a positive difference within our local community. The whole Equilibrium team are on board with our approach to helping the local community and we could not achieve this without our team of Charity Champions. The Charity Champions is a team of 12 employees across various departments within the organisation. We organise volunteer days throughout the year for members of the team to partake in within the South Manchester area.

Equilibrium offer our team three paid volunteer days a year, to encourage us to give back to the local community. The Equilibrium team smashed their target of over 89 charity days used in our last fiscal year.

Over the years we have supported a wide range of worthwhile causes and organisations.

#### These include:

**The Time Out Group** - redecorated their backyard by painting fencing and planters and assembling garden furniture.

Friends for Leisure - helped with painting and decorating.

Just Drop - baked treats for those taking part in their bikeathon fundraiser.

**East Cheshire Hospice** - supported them with a leaflet drop and coin count.

Francis House - prepared and packed knitted chicks for their Easter Chick Appeal.

The Toy Appeal - make up toy sacks for children who wouldn't usually receive a gift at Christmas.

Many of these charities have been suggested by our team as they are very close to their heart. This year, we have been fortunate enough to have a positive impact on many charities within the North West, and we are already excited for some new opportunities to arise next year.



# **Client story**

Equilibrium client Peter Boulton and his daughter Tansy ran the Manchester Marathon in April 2022 to raise money for the Margaret Hughes Hope Tribute Fund which supports The Christie. The fund, was established in memory of Peter's partner, Margaret Hughes, who passed away from breast cancer in May 2010.

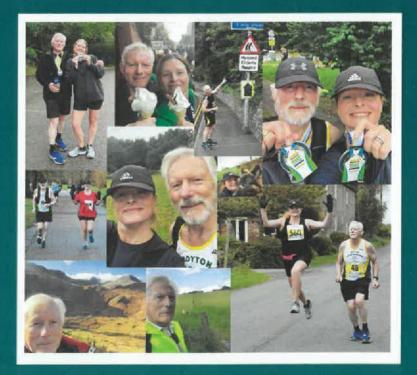
Shortly after, Tansy was diagnosed with thyroid cancer and she too received treatment from The Christie. Inspired by the excellent care that both she and Margaret had received she decided to embark on a fundraising journey, starting with the Manchester 10k in 2012. A year later she took on the London Marathon where she raised an incredible £6,253 with the support from the Equilibrium Foundation's matched funding.

Tansy encouraged Peter to join a local running club where he soon progressed to 10k runs. Following this they entered their first half marathon together, the Great North Run in 2014 and haven't looked back since, taking part in ten half marathons together!

With their sights set on even greater challenges, the duo aimed to tackle longer distances together, culminating in their decision to run the Manchester Marathon in April 2022.

"My goal was to just finish and if possible, to achieve five and a half hours. Tansy completed in 5hr 27min 16 secs and I was a second slower – we crossed the finish line together wearing our matching tutus! We raised £2,502.50 including matched funding from the Equilibrium Foundation" – Peter.

To find out more about the Margaret Hughes Hope Tribute Fund please visit **margaret-hughes.muchloved.** 





Stay up to date with the positive difference the Equilibrium Foundation is making to the lives of those in our community by visiting **www.equilibrium.co.uk/latest** 



# A look ahead

The Equilibrium Foundation's future continues to look bright.

As we edge closer to raising £1,000,000, we now look to offer a more structured approach in providing larger grants to specific sectors. With the support of our trustee and philanthropy expert, Andrew Evans, we will seek to do this in a way that ensures maximum impact.

For our community support scheme, we are now widening our reach from Manchester and Cheshire based charities to applications from across the North West.

Despite our continuous growth we will still retain the ability to pivot quickly, which will allow us to focus on immediate areas of need as they arise, as we did as of a result of the Ukraine invasion and the cost of living crisis.

We can't wait to see all the positive impacts the Foundation will have over the next few years.



# **Objectives and activities**

The Equilibrium Foundation exists to make people's lives better by supporting charitable causes with a particular focus on the North West of England.

We support a wide range of organisations with a particular emphasis on education and disability charities and on helping people experiencing all sorts of disadvantages to have better opportunities for learning and employment.

The principal objective of the charity is to promote and assist, through the provision of grants and other financial assistance, charitable activities and other charitable organisations which may be nominated by the staff and clients of Equilibrium Financial Planning LLP. We want to have the maximum possible impact, so we mostly support new and smaller charities (typically with incomes of less than £100,000 a year). Grants are normally between £2,000 and £10,000 and we sometimes offer support for more than one year.

In supporting the activities of our fundraisers and in making charitable donations, the trustees have been mindful of the Charity Commission's guidance on public benefit at our trustee meetings.

The trustees have complied with the duty in Section 17 of the Charities Act 2011 to have due regard to the public benefit guidance published by the Charity Commission.

## Structure and governance

The governing document is a trust deed dated 8 June 2010. The charity is constituted a trust. Trustees who are employed by Equilibrium Financial Planning LLP are appointed or reappointed on a five-year basis. External trustees are appointed or reappointed every three years.

All trustees give their time voluntarily and do not receive any remuneration or benefits. No

charges or costs are paid by the charity as all these are borne by Equilibrium Financial Planning LLP.

An in-house finance team oversee the finances for the trust and there is minimal risk of fraud. Professional insurance is in place to mitigate risks and provide indemnity cover for the trustees, public liability cover and legal expenses.

## **Financial review**

#### Brief statement on the charity's policy reserves

It is the charity's policy that any balance held by The Foundation in excess of £2,000 (surplus cash over and above any restricted donations or committed funds) is to be distributed. The trustees will ask the staff of Equilibrium Financial Planning LLP to suggest suitable charitable recipients.

#### Declaration

The trustees declare that they have approved the trustees report

Signature(s)

Position: Chair

Full name: Debbie Jukes

Date: 1 February 2023

# **Reference and administration details**

Charity name: The Equilibrium Foundation
Registered charity number: 1136933
Charity's principal address: Ascot House, Epsom Avenue, Handforth, Wilmslow, Cheshire, SK9 3DF
Accountants: Azets, Ship Canal House, 98 King St, Manchester M2 4WU
Auditors: Azets, Ship Canal House, 98 King St, Manchester M2 4WU

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
A Evans			
D Jukes	Chair		
C Lawson			
B Rogers			
S Warburton			
J Watmore		Resigned on 31/08/2022	

## **Statement of trustees' responsibilities**

We confirm that the following representations are made on the basis of enquiries of management and staff with relevant knowledge and experience and, where appropriate, of inspection of supporting documentation, sufficient to satisfy ourselves that we can properly make each of the following representations to you, in connection with your examination of the charity's receipts and payments account (the 'account') and a statement of assets and liabilities (the 'statement) as its annual statement of account for the year ended 31 August 2022. 1. We acknowledge, as trustees our collective responsibility under the Charities Act 2011 for presenting the account and statement and confirm that we have approved the account and statement for the year ended 31 August 2022. We also acknowledge our responsibility for making accurate representations to you. All the accounting records have been made available to you for the purpose of your assignment and all the transactions undertaken by the charity have been properly reflected and recorded in the accounting records. All other records and related information, including minutes of all trustee and management meetings, have been made available to you.

2. We confirm that the charity is entitled to prepare receipts and payments accounts and is eligible for an independent examination of its account and statement, and that there are no circumstances which we should draw to your attention which would invalidate this eligibility. We acknowledge that the work performed by you is substantially less in scope than an audit performed in accordance with International Standards on Auditing (UK and Ireland).

3. All grants, donation and other incoming resources, the receipt of which is subject to specific terms or conditions, have been notified to you. There have been no breaches of terms or conditions during the period in the application of such incoming resources.

4. The charity has satisfactory title to all assets and there are no liens or encumbrances on the charity's assets except as disclosed to you.

5. Other than those disclosed, the charity has not entered into any transactions or has balances outstanding involving trustees, officers or other related parties, which require disclosure under the law. If relevant, appropriate disclosure has been made of the control of the charity.

6. We acknowledge our responsibility for the design and implantation of internal controls to prevent and detect errors or fraud, and have disclosed to you the results of our assessment of the risk that the account and statement may be materially misstated as a result of fraud. We are unaware of any irregularities, including fraud and suspected fraud, involving management, employees or others who have significant roles in internal

control, or those employed by the charity where the fraud could have a material effect on the financial statements. No allegations of such irregularities or breaches have come to our notice.

7. We are unaware of any breaches or possible breaches of statute, regulations, contracts, agreements or the charity's constitution which might result in the charity suffering significant penalties or other loss. No allegations of such irregularities or breaches have come to our notice. We confirm that the charity has had no non-routine communication with Charity Commission during or since the period of which you are unaware.

8. We have reviewed the affairs of the charity and confirm that no income is subject to income or capital gains tax. We have also reviewed the VAT treatment in relation to contractual services provided by the charity and confirm that VAT has been correctly accounted for.

9. The account and statement have been prepared on the going concern basis as we believe that adequate cash and resources will be available to cover the charity's requirements for working capital and capital expenditure for at least the next twelve months.

10. There have been no events since the reporting date which necessitate revision of the figures included in the account and statement or inclusion of a note thereto. Should further material events occur, which may necessitate revision of the figures included in the financial statements or inclusion of a note thereto, we will advise you accordingly.

# **Receipts and payments accounts**

#### For the period from 01/09/2021 to 31/08/2022

# **Receipts and payments accounts**

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts	85,891	76,791		162,682	150,187
A2 Asset and investment sales		-	-	-	-
Total receipts	85,891	76,791	-	162,682	150,187
A3 Payments	109,044	91,930	-	200,974	99,263
A4 Asset and investment purchases	÷				
Total payments	109,044	91,930	-	200,974	99,263
Net of receipts	-23,153	-15,139	-	-38,293	50,924
A5 Transfers between funds	-16,001	16,001			-
A6 Cash funds last year end	67,817		-	67,817	16,893
Cash funds this year end	28,663	862	-	29,525	67,817

# Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
B1 Cash funds	Cash at bank	28,663	862	*
B2 Other monetary assets			-	-
B3 Investment assets		-	-	-
B4 Assets retained for the charity's own use	-	-		-
B5 Liabilities		-	-	-
Signed: 1 June	Name: Debbie J	ukes	Date: 1 Feb	oruary 2023

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# Independent examiner's report

Report to the trustees/ members of	The Equilibrium Foundation		
On accounts for the year ended	31 August 2022		
Charity no (if any)	1136933		
Set out on pages	20		
Respective responsibilities of trustees and examiner	The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed. It is my responsibility to: • examine the accounts under section 145 of the Charities Act, • to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and • to state whether particular matters have come to my attention.		
Basis of independent examiner's statement	My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.		
Independent examiner's statement	<ul> <li>In connection with my examination, no matter has come to my attention</li> <li>1. which gives me reasonable cause to believe that in, any material respect, the requirements: <ul> <li>to keep accounting records in accordance with section 130 of the Charities Act; and</li> <li>to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act have not been met; or</li> <li>to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.</li> </ul> </li> </ul>		
signed: MUNDEL	Name: 5 M CASSEY Date: 23 JUNO 23		
Relevant professional	Chartered Accountant		

qualification(s) or body:

**Address** 

Azets Audit Services Fleet House, New Road, Lancaster LA1 1EZ



Registered charity number: 1136933

#### **Head Office**

Ascot House, Epsom Avenue, Handforth, Wilmslow, Cheshire SK9 3DF

## **Chester Office** 19a Telford Court,

Chester Gates Business Park, Chester CH1 6LT

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