

**National Tremor Foundation Charitable Trust**

**Report & Financial Statements  
for the year ended 31 December 2014**

**Charity number: 1042013**

# National Tremor Foundation Charitable Trust

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**National Tremor Foundation Charitable Trust**  
**Trustees' Annual Report for the Year Ended 31 December 2014**

**REFERENCE AND ADMINISTRATIVE DETAILS**

**Trustees**

- at date of report's approval:

Professor Leslie J Findley TD, MD, FRCP (Consultant Neurologist)	Chairman
Kevin Harfoot	Treasurer
Dr Peter Bain MBBS MA MD FRCP (Consultant Neurologist)	
Lizzie Graham	
John Kidney (Solicitor)	

**Registered Office**

Long Term Conditions Centre  
Harold Wood Hospital  
Gubbins Lane  
Romford RM3 0BE

**Bankers**

National Westminster Bank

**Independent Examiner**

Frank Learner  
Greengage Associates  
8 Ffordd Cwm Cidi, Barry  
Vale of Glamorgan CF62 6LH

**Charity Registration Details**

Name: National Tremor Foundation Charitable Trust  
No: 1042013

**STRUCTURE, GOVERNANCE & MANAGEMENT**

**Governing Document**

The Trust is governed by a Declaration of Trust dated 19 October 1994 and was registered as a charity on 9 November 1994.

**Recruitment and Appointment of Trustees**

New trustees are recruited for the special contribution they can make to the Trust and are appointed by resolution of the Trustees.

**OBJECTIVES & ACTIVITIES**

The Trust's objects are:

- To promote, centralise and co-ordinate for the benefit of the public any form of research into essential, idiopathic and hereditary tremor and to disseminate and publish the useful results of such research.
- To relieve the need of sufferers from essential, idiopathic and hereditary tremor.
- To advance the education of the public in the subject of essential, idiopathic and hereditary tremor.

The Trust is currently able to resource these charitable activities:

- **Information.** Provision of knowledge to people affected by tremor or movement disorders of various parts of the body in order to help them and their families/carers manage the condition. The initial source for the Trust's beneficiaries is the website which the Trust believes is the leading source of information on this condition for over one million sufferers in the UK. Further sources are a newsletter (available in hard and soft copy), a general telephone enquiry service and access to an advisory panel.
- **Beneficiary support.** This activity covers the annual conference, active support and the encouragement/subsidy of regional support groups where there are known clusters of interested beneficiaries.

**ACHIEVEMENTS & PERFORMANCE**

This section explains the activities for the reporting period; in a difficult economic environment the Trust has managed to keep costs to a minimum and maintain the central office support facility.



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**Information**

The website gives a range of information on tremors (from diagnosis and clinical characteristics to current research topics and help for carers) and attracted visitors from USA and the UK. Our social networking continued to grow with our established facebook page proving very popular & a new twitter account created with a direct link to our website. Our website was further developed with a members area created with a discussion forum and an "ask the panel" section, where members could ask an expert panel tremor related questions. The general forum allows our members to interact with other people with similar tremor related topics. We also set up an automated system on our website to simplify the way to become a member. We acquired the services of an IT specialist who continually updates the website with tremor related news. With the help of Northgate Partners, we also funded the production & distribution of 10,000 information packs sent to GP surgeries throughout the UK.

**Beneficiary Support**

The conference, held in the Autumn, gave beneficiaries a valued chance to both learn more about tremors and to meet the medical experts in person. Topical research issues covered at the conference included Essential and Orthostatic tremor. The Primary Orthostatic group held their own meeting before taking part in the afternoon question & answer session. Active support has included payments to our Scottish, Norwich & Bristol groups to facilitate meetings, newsletters & further development. The Trust currently has three active regional support groups and are always looking to set up further groups around the UK. Such regional/local groups provide the opportunity for beneficiaries to regularly meet together for mutual support which is highly valued. It is important for them to have an environment where they feel comfortable socialising without being conscious of a tremor - and thus reducing isolation. In 2014 we also spent £4.5k in producing information packs.

**COMMUNICATIONS & FUNDRAISING REVIEW**

As in previous years, funding was requested from charitable trusts that are concerned with helping organisations dedicated to helping disabled people. The Trust received substantial support from 32 donors. In view of the continuing low interest rate caused by the national economic climate, the level of donations has again been modest but very welcome. A direct approach via letter, internet and occasional personal visits was adopted as the most cost efficient method of generally raising funds. £10,000 was also secured towards a research project.

Many members also sent donations to help maintain the services of the Trust and appreciation is given to some members who organised local events such as the Murder Mystery Night, parachute jump and as guest speakers at Rotary and Probus Clubs.

**PLANS FOR FUTURE PERIODS**

The Trust's main priority is to continue to develop the website further - both its technical capability and content - due to the wide reach and accessibility (important for tremor-sufferers) of the web and the importance of social media channels. It is anticipated that the use of the recently developed on-line user-friendly member's forum, automated online donations and membership will encourage the on-line community to grow.

Our ultimate objective is to provide some funding for research into basic mechanisms and therapies for tremors of all types, particularly those in the essential tremor groups, including primary orthostatic tremor which is generally poorly supported from other funding bodies. Such activities are dependent on funding availability, which is secondarily dependent on the economic climate.

Indicative of this ultimate objective, in 2015 the Trust will begin funding a project to track the effectiveness of deep brain stimulation: a treatment to reduce physical involuntary movement. An electrode, placed in the brain, is connected to a neuro stimulator implanted into the upper body. The purpose of the project is to create a Neuro Rating Scale for national publication by funding a qualified Movement Disorder Nurse to record the impact of the operation on the lives of a statistically significant sample of patients.

The Trust also intends to produce newsletters on a regular basis (dependent on content being available) with the assistance of a member from the Primary Orthostatic Tremor group. We anticipate greater interaction via our Facebook page and will look to use Twitter as a tool for raising further



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**Trustees' Annual Report for the Year Ended 31 December 2014**

awareness. For 2015, membership to the Trust will again be free, although we will encourage donations from individuals along with our ongoing search for funds via charitable trusts

### **PUBLIC BENEFIT STATEMENT**

The Trustees confirm that they have complied with the duty in the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit. As stated elsewhere in this report, the Trust's charitable activity work is clear evidence of both the identifiable benefit provided and the relation of this benefit to the charity's aims. Continuing website feedback shows that the Trust is regularly reaching people affected by tremors - both in UK and overseas.

### **RISK MANAGEMENT**

The Trustees continually examine the principal areas of the Trust's operations and regularly consider the major risks that may arise in each of these areas. After a period of relatively low-risk, member-focussed activity, the Trust will review its risk management policy in 2015 as it starts to fund higher-risk research activity.

### **FINANCIAL REVIEW**

Our income received for 2014 reached £63k thanks primarily to donations from various trusts & members. £10,725 of these funds are for restricted use in 2015. With membership now free, we encouraged members to voluntarily donate. This proved to be successful in 2014 with many people donating what they could afford. Our primary costs continue to be invested in fundraising and our website, with a dedicated IT specialist now engaged to continually monitor and upgrade the website. After reporting a record surplus for 2013, we are pleased that our progression continued with another surplus in 2014.

#### **Reserves Policy**

The Trustees' target level of reserves is 12 months of operational costs (approximately £40k) - should there be a gap in funding. At the year end the reserves held were £ 91,314 (previous year £85,120). The reserves currently held above this target are earmarked for future research projects - one of which is starting in 2015.

### **STATEMENT OF TRUSTEES' RESPONSIBILITIES**

Charity law requires the Trustees to prepare financial statements for each financial year which show a true and fair view of the state of affairs of the Trust and its financial activities for that period. In preparing those financial statements, the Trustees are required to:

- Select suitable accounting policies and then apply them consistently.
- Make judgements and estimates that are reasonable and prudent.
- State whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures disclosed and explained in the financial statements.
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Trust will continue in operational existence.

The Trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the Trust and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

On behalf of the Board:



Approved by the Board on 6<sup>th</sup> June 2015

## **INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE NATIONAL TREMOR FOUNDATION CHARITABLE TRUST**

I report on the Trust's accounts for the year ended 31 December 2014, which are set out on pages 5 - 8.

### **Respective responsibilities of Trustees and examiner**

The Trustees are responsible for the preparation of the accounts. The Trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed. The Trust's gross income for this year has not exceeded £250,000.

Having satisfied myself that the Trust is eligible for independent examination, it is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- to state whether particular matters have come to my attention.

### **Basis of independent examiner's report**

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the Trust 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 you as 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**

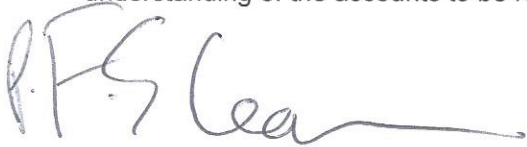
In connection with my examination, no matter has come to my attention:

(1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance in accordance with section 130 of the 2011 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

have not been met; or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



Frank Learner DChA  
Fellow, Association of Charity Independent Examiners

Greengage Associates  
8 Ffordd Cwm Cidi  
Barry  
Vale of Glamorgan CF62 6LH

6<sup>th</sup> June 2015

**National Tremor Foundation Charitable Trust**

**Statement of Financial Activities for the Year Ended 31 December 2014**

	Notes	Unrestricted funds	Restricted funds	Total for year	
		£	£	2014	2013
		£	£	£	£
<b>Incoming Resources</b>					
Voluntary Income					
Donations		17,883	-	17,883	7,666
Grants		32,360	-	32,360	29,210
Legacy		1,000	-	1,000	63,162
Subscriptions		1,655	-	1,655	5,376
Other		-	-	-	-
Charitable Activities		103	10,725	10,828	728
<b>Total Incoming Resources</b>		<u>53,001</u>	<u>10,725</u>	<u>63,726</u>	<u>106,142</u>
<b>Resources Expended</b>					
2					
Costs of Generating Funds					
		19,687	-	19,687	18,387
Charitable Activities					
Information		14,177	-	14,177	9,789
Beneficiary Support		6,061	-	6,061	5,258
Governance	3	7,407	-	7,407	6,724
<b>Total Resources Expended</b>		<u>47,332</u>	<u>-</u>	<u>47,332</u>	<u>40,158</u>
<b>Net movement in funds</b>		5,669	10,725	16,394	65,984
<b>Reconciliation of funds</b>					
Total funds brought forward		85,645	-	85,645	19,661
Total funds carried forward		<u>91,314</u>	<u>10,725</u>	<u>102,039</u>	<u>85,645</u>



**National Tremor Foundation Charitable Trust**

**Balance Sheet as at 31 December 2014**

	Notes	31 December 2014		31 December 2013	
		£	£	£	£
<b>Fixed assets</b>					
Tangible assets	5	-		525	
			-		525
<b>Current assets</b>					
Debtors	6	375		660	
Cash at bank		110,535		94,638	
		<u>110,910</u>		<u>95,298</u>	
<b>Creditors: Amounts falling due within one year</b>	7	<u>(8,871)</u>		<u>(10,178)</u>	
<b>Net current assets/(liabilities)</b>			102,039		85,120
<b>Net Assets</b>			<u>102,039</u>		<u>85,645</u>
<b>Funds</b>					
Unrestricted income funds			91,314		85,645
Restricted income funds	8		10,725		-
			<u>102,039</u>		<u>85,645</u>

On behalf of the Board:



Approved by the Board on 6<sup>th</sup> June 2015

The notes on pages 7 to 8 form part of these financial statements



**National Tremor Foundation Charitable Trust**  
**Notes to the Financial Statements for the Year ended 31 December 2014**

**1. ACCOUNTING POLICIES**

**Accounting convention**

The financial statements have been prepared under the historical cost convention and in accordance with the Statement of Recommended Practice-Accounting and Reporting by Charities (SORP 2005), applicable UK accounting standards and the Charities Act 2011.

**Fund accounting**

- Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the Trust.
- Restricted funds are subject to restrictions on their expenditure imposed by the donor or through the terms advertised by the Trust.

**Incoming resources**

All incoming resources are included in the statement of financial activities when the Trust is entitled to the income and the amount can be quantified with reasonable accuracy. The following specific policies are applied to particular categories of income:

- Voluntary income is received by way of grants and donations and is included in full in the Statement of Financial Activities when receivable. Grants, where entitlement is not conditional on the delivery of a specific performance by the Trust, are recognised when the Trust becomes unconditionally entitled to the grant.
- Donated services and facilities are included at the value to the Trust where this can be quantified.
- Incoming resources from grants, where related to performance and specific deliverables, are accounted for as the Trust earns the right to consideration by its performance.

**Resources expended**

Expenditure is recognised on an accruals basis as a liability is incurred. Expenditure includes any VAT which cannot be fully recovered and is reported as part of the expenditure to which it relates:

- Costs of generating funds comprise the costs associated with attracting voluntary income.
- Charitable expenditure comprises those costs incurred by the Trust in the delivery of its activities and services for its beneficiaries. It includes both costs that can be allocated directly to such activities and those costs of an indirect nature necessary to support them.
- Governance costs include those costs associated with meeting the constitutional and statutory requirements of the Trust and also costs linked to the strategic management of the charity.

**Fixed assets**

Depreciation is provided on a 25% reducing balance basis in order to write off the assets over their estimated useful lives. The item capital threshold is £1,000 (previous year £500) & the minimum item net book value is £200.

**2 RESOURCES EXPENDED**

	Direct	Contractor	Support	2014	2013
	£	£	£	£	£
Cost of Generating Funds	3,320	12,401	3,966	19,687	18,387
Charitable Activities					
Information	10,286	1,908	1,983	14,177	9,789
Beneficiary Support	3,360	1,908	793	6,061	5,258
Governance	3,355	2,862	1,190	7,407	6,724
Total Resources Expended	20,321	19,079	7,932	47,332	40,158

Costs have been attributed on a basis consistent with the use of resources. Where costs cannot be allocated, they are apportioned by the estimated percentage of time spent on each activity. Support costs are mainly office-based costs such as IT and postage.

**National Tremor Foundation Charitable Trust**

**Notes to the Financial Statements for the Year ended 31 December 2014**

<b>3 GOVERNANCE COSTS</b>	<b>2014</b>	<b>2013</b>
	£	£
Meeting Costs	1,807	1,017
Independent Examination	645	645
Other services from Independent Examiner	690	690
Affiliation fees	213	165
Contractor-related costs	2,862	3,414
Office overhead	1,190	793
<b>Total Governance Costs</b>	<u>7,407</u>	<u>6,724</u>

**4 OTHER EXPENDITURE**

The Trust does not employ any staff and relies on a contractor for its office duties. 2 trustees were re-imbursed for expenses totalling £740 (previous year: 2 trustees £766).

**5 FIXED ASSETS**

	£
<b>Cost</b>	
At 1 Jan 2014	700
Additions	-
At 31 Dec 2014	<u>700</u>
<b>Depreciation</b>	
At 1 Jan 2014	175
Charge for year	525
At 31 Dec 2014	<u>700</u>
Net book value at 1 Jan 2014	525
<b>Net book value at 31 Dec 2014</b>	-

**6 DEBTORS**

	<b>2014</b>	<b>2013</b>
	£	£
Prepayment	375	660
<b>Total debtors</b>	<u>375</u>	<u>660</u>

**7 CREDITORS**

	<b>2014</b>	<b>2013</b>
	£	£
Trade creditors	675	562
Advance subscriptions	-	1,420
Other creditors and accruals	8,196	8,196
<b>Total creditors</b>	<u>8,871</u>	<u>10,178</u>

**8 RESTRICTED FUNDS**

	<b>At 1 Jan 2014</b>	<b>Incoming Resources</b>	<b>Outgoing Resources</b>	<b>At 31 Dec 2014</b>
	£	£	£	£
Neuro Rating Scale Project	-	10,000	-	10,000
Orthostatic Tremor Group	-	725	-	725
	<u>-</u>	<u>10,725</u>	<u>-</u>	<u>10,725</u>

The Neuro Rating Scale project is to fund a qualified Movement Disorder nurse to record the progress of a programme of deep brain stimulation operations and create a Neuro Rating Scale for national publication. The Orthostatic Tremor funding is for the group's running costs.

**9 FUND/ASSET ANALYSIS**

	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>2014 total funds</b>	<b>2013 total funds</b>
	£	£	£	£
Fixed assets	-	-	-	525
Net current assets	91,314	10,725	102,039	85,120
	<u>91,314</u>	<u>10,725</u>	<u>102,039</u>	<u>85,645</u>