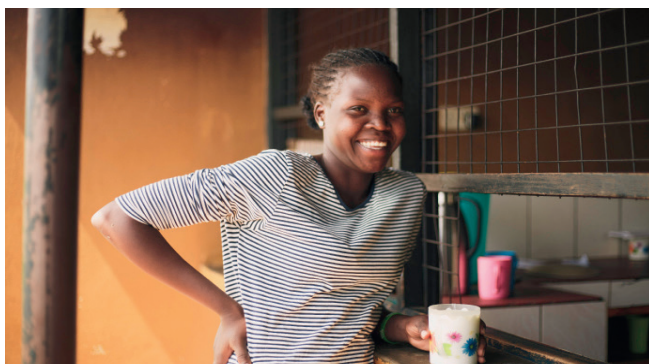


## Our Efforts

Philip J Milton & Company in its various guises has always recognised the local community from which much of its success emanates. Over the years, the Company and its owners have supported ventures worldwide and especially locally and as the Company has grown an objective grew to create a separate Charitable Foundation which will receive donations (albeit primarily from the Company and its owners) and then be available to generate and provide endowment funding in support of its charitable objectives.



*Tearfund Charity Efforts*

These causes are myriad and will hone the present charitable support of the Company and its owners and also provide a launchpad to extend and increase this involvement through the generous initial bequest by the owners to seed the start-up capital to that end but it is intended to fund further capital on an ongoing basis too.

## Charity Objectives

To provide grants to any of the following as the Trustees shall see fit:

1. Any UK registered charity operating in the areas of education, poverty relief, disaster relief or Christian activity
2. Any organisation operating in the North Devon region to benefit local community facilities, the arts or culture for the public benefit
3. Any individual anywhere in the world for the purpose of education or training, poverty relief or medical treatment
4. Any organisation assisting in the development of programmes for financial education including budgeting, basic finance, home economics and basic culinary skills

All of the above provide benefit to the public in some form. Helping the public in financial education for example can ensure that fewer are reliant on the State and can better manage their own finances. We also look to assisting the community of North Devon and beyond with grants which otherwise would not be available from other sources.

## Foundation Focus

Whilst wide-ranging, some core objectives are intended to be pursued, such as financial education to those in need in our local area and to consider if a suitable programme is possible to roll-out more widely.

The Foundation will also become a focus for some of the present rather more eclectic programmes which the Company and its founders have supported, from the Local Museum building appeal to sponsoring foreign aid studentships and small local charities with specific needs, so these can all be channelled in future through a cohesive strategy and through one organisation. It would be hoped too that according to the size of the Foundation that some staffing (probably by secondment as no employment is being considered) will be provided to it to start to promote it and its endowments and to act as a conduit and possibly a match-funder to encourage other good causes, especially in the local area.

Of course it is important to realise it cannot do all of these things all of the time but it is excellent to have noble plans and objectives to which to work.



Senior Trustee

## Local Needs

There is also opportunity to support a small-scale Local Needs' social housing venture and this would not be excluded from the considerations in helping those in need locally too. However, that would not be allowed to concentrate the energies of the Foundation of course, in exclusion to other activities.

Over the years, since the founding Company's establishment in 1985, its charitable responses have been somewhat fragmented so the creation of the Foundation will hone that activity and create operational efficiencies too.

It will also act as an appropriate encouraging entity to the Staff of the Firm who participate in its success, so that they will recognise better its community and charitable objectives within the mainstream business, as provided as a consequence of its success. It will also create a suitable public charitable front for Philip J Milton & Company Plc

Thus this is planned to be a charity which can continue into perpetuity and beyond the Firm's present owners' lifetimes and as key beneficiaries within their Wills in due course, too. It would be good if the Foundation can engage in local community works too and promotions of all the morals and ethical values of the Firm itself.

The Firm was established in 1985 and with its complement of over thirty staff is proud to offer a fully independent financial and investment planning service, advising upon all aspects of clients' financial affairs with some of the most qualified and experienced staff in the Country.



## Our Services

Wealth & Portfolio Management\*

Retirement & Financial Planning\*

Tax Planning\*

Personal Accountancy & Taxation

Attorneyships, Wills, Trusts &  
Probate Administration

*\*Authorised & Regulated by the Financial Conduct Authority*

Contact us today for a no obligation  
Initial consultation at our cost.



At Trimstone Manor Country House Hotel, our sister business we are always happy to work with charities. There are countless most deserving causes but what is sad, is that for the most, these charities often have high staffing costs, and often generous salaries to fund-raisers.

We can help and support organising functions, here at Trimstone, at very special rates, sometimes complimentary, so more money goes directly to the cause. This can be an event held in the Tyme Restaurant or enjoying the beautiful setting in the grounds, for cream teas in the gardens. In our sister business, equally, as in all of our businesses, it is wonderful to be able to reciprocate with supporting organisations or the charitable causes which our customers and clients support themselves. We are happy to discuss and support any ideas to help raise some meaningful money for you.

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