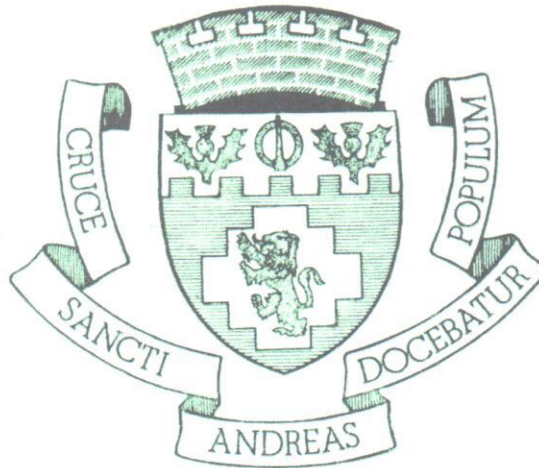




Newburgh Ancestry and History Society

Scottish Charity No: SC052958

Annual Report & Financial Statements

For the year to

31 May 2026

Chris Smith BSc (Hons) FCIE
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Newburgh Ancestry and History Society

Annual Report & Statement of Account For the year to 31 May 2026

Contents	Page
Trustees' Annual Report	3 - 5
Independent Examiner's Report	6
Statement of Receipts and Payments	7
Statement of Balances	8
Notes to the Accounts	9

Newburgh Ancestry and History Society

Trustees' Annual Report For the year to 31 May 2026

The charity trustees present their report together with the financial statements and the Independent Examiner's report for the year to 31 May 2026.

Reference & Administrative Information

Charity Name:	Newburgh Ancestry and History Society
Charity Number:	SC052958
Registered Address:	17 Scotland Terrace, Newburgh, Fife KY14 6AY
Principal Address:	Lower Laing Museum, 120 High Street, Newburgh, Fife KY14 6DX
Trustees:	James Lee - Chairman Janice Spence - Treasurer Helen Welsh - Secretary Sandra Carstairs Kathleen Low Frances Black Sue Lee Kenneth Brown

Structure, Governance & Management

Newburgh Ancestry and History Society (NAAHS) is a Scottish Charitable Incorporated Organisation (SCIO) entered onto the Scottish charity Register on the 20 November 2023 and is governed by its constitution. NAAHS is a single tier SCIO with a Board of up to 7 charity trustees who manage the affairs of the Society.

At each AGM one third of the longest serving members since their last appointment retire and the remaining Board members appoint trustees to fill the vacancies at the next Board meeting. Retiring trustees can be re-appointed.

Newburgh Ancestry and History Society

Trustees' Annual Report For the year to 31 May 2026

Objectives & Activities

The purpose of Newburgh Ancestry and History Society is the advancement of education, arts, heritage, cultural and science by undertaking the following: -

1. to advance and encourage an interest in history, with particular emphasis on the history of Newburgh and the surrounding area, to educate and inform members of the SCIO and the public generally, and to encourage and facilitate research, understanding and publication of the cultural heritage of the area.
2. to preserve, conserve, understand and interpret, within the national context, the historical and cultural heritage of Newburgh and the surrounding area.
3. to provide a community resource at the Laing Museum through the collection, classification and conservation of items of local historical interest.
4. to promote and advance heritage in Newburgh and the surrounding area as a source of pride and to address heritage issues affecting the area.

Achievements & Performance

I would like to take this opportunity to thank the Trustees and all our Volunteers once again for their ongoing hard work in keeping the doors open and retaining public interest, in the Lower Laing Museum. This is full of items and photos of Newburgh and the surrounding local area's culture and heritage, from the simple tasks of researching items on display, cleaning display artifacts, researching new displays for future use, also continuing down various channels, in the hope of producing and publishing small books etc, which would be available for purchase by the general public to help day to day running costs. Also, the care and attention to detail that they take in learning about the displays that they set up, so that knowledge can be passed onto anyone visiting, not forgetting our fantastic Ancestry section who continue to give their time and effort, delving into the past to help people worldwide, who wish to find out about their roots in our local area.

We recently purchased a new computer for Ancestry section to help improve efficiency in their research. Also this year, we were given the Tom Pearson collection which has between 30,000 and 40,000 Photographs and Postcards of the local area.

Visitor numbers remain the same as last season at present

Newburgh Ancestry and History Society

Trustees' Annual Report For the year to 31 May 2026

Financial Review

The Society received income totaling £579 primarily from donations. With expenditure of £3,016 the Society had a deficit for the period of £2,437. The deficit was funded from reserves brought forward from the previous financial year. At the 31 May 2026 the Society held unrestricted reserves of £2,796 to ensure that the charity has sufficient funds to meet liabilities as they fall due and cover unforeseen contingencies.

This report was approved by the charity trustees on15TH JULY.....and signed on their behalf by:

..........

James Lee - Chairman

Newburgh Ancestry and History Society

Independent Examiner's Report For the year to 31 May 2026

I report on the accounts of Newburgh Ancestry and History Society for the year to 31 May 2026 which are set out on pages 7 to 9.

Responsibilities and basis of report

The charity's trustees are responsible for the preparation of the accounts in accordance with the requirements of the Charities and Trustee Investment (Scotland) Act 2005 ("the 2005 Act") and the Charities Accounts (Scotland) Regulations 2006 ("the 2006 Regulations").

I have satisfied myself that the charity is not subject to audit under Regulation (10)(1)(d) of the 2006 Regulations and is eligible for independent examination. I have therefore examined the charity's accounts as required under section (44)(1)(c) of the 2005 Act and Regulation 11 of the 2006 Regulations. In carrying out my examination I have followed the guidance issued to independent examiners by the Office of the Scottish Charity Regulator (OSCR).

My role is to state whether any material matters have come to my attention giving me cause to believe that:

1. the accounting records were not kept as required by section 44(1)(a) of the 2005 Act and Regulation 4 of the 2006 Regulations, or
2. the accounts do not accord with those records, or
3. the accounts do not comply with the accounting requirements of Regulation 9 of the 2006 Regulations, or
4. there is further information needed for a proper understanding of the accounts.

Independent examiner's statement

I have completed my examination, and I have no concerns in respect of any of the above and I have found no other matters that require drawing to your attention.



Chris Smith FCIE
Glascairn Cottage
Aytounhill
Cupar
Fife KY14 6JH

3/8/26

Newburgh Ancestry and History Society

Statement of Receipts & Payments For the year to 31 May 2026

	Note	Unrestricted Funds	Restricted Funds	2026 Total	2025 Total
		£	£	£	£
Receipts					
Donations		576	-	576	2,651
Family research donations		-	-	-	190
Grants		-	-	-	1,550
Fundraising		-	-	-	933
Bank interest		3	-	3	-
Total receipts		<u>579</u>	<u>-</u>	<u>579</u>	<u>5,324</u>
Payments					
IT		1,593	-	1,593	1,381
Insurance		178	-	178	163
Stationery		55	-	55	1,273
Family research		-	-	-	307
Display materials		215	-	215	274
Repairs and maintenance		-	-	-	492
Fundraising		-	-	-	900
Bank Charges		76	-	76	-
Other		-	-	-	186
Computer & laptop		273	426	699	1,124
Independent examination		200	-	200	200
Total payments		<u>2,590</u>	<u>426</u>	<u>3,016</u>	<u>6,300</u>
Surplus/(deficit)		<u>(2,011)</u>	<u>(426)</u>	<u>(2,437)</u>	<u>(976)</u>

Newburgh Ancestry and History Society

Statement of Balances At 31 May 2026

Note	Unrestricted Funds	Restricted Funds	2026 Total	2025 Total
	£	£	£	£
Opening bank & cash balances	4,807	426	5,233	6,209
Surplus/(deficit)	(2,011)	(426)	(2,437)	(976)
Closing bank and cash balances	2,796	-	2,796	5,233

Assets

Furniture & equipment	Unrestricted fund	1,344	1,344
Computers and Printers	"	2,923	2,224
Artifact storage & display	"	990	990
Museum artifacts	3	-	-

Liabilities

There were no liabilities at 31 May 2026

Approved by the charity trustees on 15/07/26 and signed on their behalf by:

Janice Spence

Janice Spence - Treasurer

Newburgh Ancestry and History Society

Notes to the Financial Statements For the year to 31 May 2026

1. Accounting Policies

These accounts have been prepared on the Receipts & Payments basis in accordance with: -

- (a) The Charities & Trustee Investment Act (Scotland) Act 2005, and
- (b) The Charities Accounts (Scotland) Regulations 2006 (as amended).

Income and expenditure is recognised when received or disbursed.

The Charity maintains:-

- (a) A general unrestricted fund for the day-to-day running of the charity which is expendable at the discretion of the management committee in furtherance of the charity's objects, and
- (b) Restricted funds that consist of monies received from sponsors which relate to a specific project and are donated to fund a particular purpose. During the year the Society held one restricted fund for the purchase of a new computer and laptop funded by a grant from Fife Council, see note 4 below.

2. Trustee Remuneration & Expenses

A total of £455 was paid to the daughter-in-law of Frances Black, a trustee, for IT services provided to the Society.

No other remuneration or expenses were paid to trustees.

3. Museum Collection & Artifacts

The trustees have been unable to put a reliable value on the collection and artifacts in the Laing Museum.

4. Movement in Restricted Funds

Fund	Opening balance	Income	Expenditure	Transfers	Closing balance
	£	£	£	£	£
New computer and laptop	426	-	426	-	-
Total	426	-	426	-	-