



Information on Golden Leaves Trust

The Golden Leaves Trust has continued to grow over the past year, with 41,474 active plans (incl. of instalment plans) in the fund at the financial year-end. A 5% increase compared to a year before. The total value of trust investments has also increased due to of new plans purchased during the year and an increase in the value of the investments, and is now approximately of £113 million.

The Trust Statement to 5th April 2021

The full audited figures for the Golden Leaves Trust to 5th April 2021 – are below. The trust saw significant growth over the year due to good performance of investments and a 10% increase in the number of plans sold.

Disbursements and some contracts increased in line with the RPI. Where contract performance is related to the performance of the trust, the trustees applied a bonus of **4%** to the funeral directors fee.

The actuary reported a surplus of assets over liabilities of 23% - after the bonuses have been applied - to provide a realistic solvency margin.

The Year to 5th April 2021

Funerals provided in the year 2783

Active plans at year end 44,582 (including instalment plans)

Total net assets £123,737,000

Total future liabilities £98,290,000

Surplus £22,093,000

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