# Jeffrey Blyth Foundation

This is the quarterly report (unaudited) to Blind Citizens Australia for the information of supporters of the Shirley Fund. It covers the period 1 July 2022 to 30 June 2023.

The Shirley fund was established in October 2017 as a sub-fund following a gift to the Jeffrey Blyth Foundation from Blind Citizens NSW of $2,386,109.50. It holds assets which can only be distributed for the benefit of people who are blind or vision-impaired in NSW and the ACT. The Trustee welcomes gifts and bequests to the Shirley fund to assist its ongoing support to Blind Citizens Australia benefitting blind and vision-impaired people in NSW and the ACT.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|   | Q1 | Q2 | Q3 | Q4 | YTD |
|   | 1 Jul – 30 Sep 2022 | 1 Oct – 31 Dec 2022 | 1 Jan – 31 Mar 2023 | 1 Apr – 30 Jun 2023 | 1 Jul - 30 Jun 2023 |
| Equity at start of period | $2,315,137 | $2,379,709 | $2,450,338 | $2,469,662 | $2,315,137 |
|   |  |  |  |  |  |
| Shirley fund income: |  |  |  |  |  |
| Investment related | $68,925 | $121,094 | $70,978 | $67,184 | $328,180 |
| Donations | $0 | $0 | $0 | $0 | $0 |
| Expenses | -$4,352 | -$4,161 | -$5,352 | -$23,743 | -$37,608 |
| Current year profit allocation / Net operating result: | $64,572 | $116,933 | $65,626 | $43,441 | $290,572 |
|   |  |  |  |  |  |
| Grants paid out | $0 | -$46,303 | -$46,303 | $0 | -$92,606 |
| Change in equity | $64,572 | $70,630 | $19,323 | $43,441 | $197,966 |
|   |  |  |  |  |  |
| Equity at end of period | $2,379,709 | $2,450,338 | $2,469,662 | $2,513,103 | $2,513,103 |
|  |  |  |  |  |  |
| S&P/ASX 200 Net Total Return comparison | 0.32% | 9.33% | 3.43% | 0.95% | 14.52% |

Grants from the Shirley fund to Blind Citizens Australia are made as equal instalments in October and February each year. The budgeted grant from the Shirley Fund for financial year 2022–2023 is $92,606.

The assets of The Jeffrey Blyth Foundation are held in its Trust Fund. The Trust Fund has two sub-funds known as the General Fund and the Shirley Fund. Donations to the Jeffrey Blyth Foundation, which are tax deductible, go into the General fund unless the donor specifies that their donations are for the Shirley fund.

Please consider donating to the Jeffrey Blyth Foundation or leaving us a bequest. If you wish to do so, please reach us through the office of Blind Citizens Australia.

For any enquiries or for further information, please contact:

Bill Jolley

Chair of the Jeffrey Blyth Foundation

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