



**Golden Leaves
Funeral Plans**

Information on Golden Leaves Trust

The Golden Leaves Trust has continued to grow over the past year with 44,582 active plans (incl. of instalment plans) under management in the fund at the period end. A 7.5% increase compared to the period before. The total value of trust investments has increased due to new plans purchased during the year and an increase in the value of the investments. The Trust value is now approximately £120 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 period due to the performance of investments and an increase in the number of plans sold.

Disbursements and some funeral director contracts increased in line with the RPI. Funeral director contracts related to the performance of the trust received a bonus of 4% in line with annual bonuses since 2002.

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

The Period to 5th April 2021

Funerals provided in the period	3268
Active plans at year end	44,582
Total net assets	£120,380,000
Total future liabilities	£98,290,000
Surplus	£22,093,000

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