

Thorntons Law LLP
The Aberbrothock Skea Trust
Scottish Charities Office No: SC039202

Contact:

Angela Bell
Trust Manager
For Thorntons Law LLP

Whitehall House
33 Yeaman Shore
Dundee
DD1 4BJ

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This Trust was established in 2008 following on the merger of Aberbrothock Charitable Trust and Amy Barnet Skea Charitable Trust. The Aberbrothock Charitable Trust had been established by the late Brigadier and Mrs Oliver of Arbroath in 1971 with a direction that the income of the Trust be used to promote purposes for the benefit of the community which are recognised in law as charitable. Mrs Amy Barnet Skea, late of Brooklyn, Keptie Road, Arbroath died on 1st July, 1993 leaving the residue of her Estate to be held in a Charitable Trust with the income of the same to be made over to charitable institutions as chosen by her Trustees.

The new Aberbrothock Skea Trust has an available income currently of around £100,000 per annum which is distributed by the eight Trustees at three meetings each year, normally in March, August and December.

In order to focus benefit in useful sums, the current policy of the Trust is to give grants only to organisations with charitable status carrying out their objectives within Angus, Dundee, Perth and Kinross, Aberdeenshire and Kincardineshire. A significant part of the annual distribution is made over to voluntary groups based or supporting works in Angus and in particular Arbroath. There is no restriction on the type of organisation that may be supported, provided it has charitable status, the Trustees will not normally give grants in the following circumstances:-

1. To any organisations which are not recognised as a charity by the Inland Revenue.
2. To individuals, including students.
3. Sponsorship or marketing appeals.
4. Activities which collect funds for subsequent redistribution to others.
5. Expeditions or overseas travel.

The Trustees are particular keen to support (a) projects which improve the quality of life of the residents of Angus (and in particular Arbroath); (b) organisations involved in community activities; (c) groups assisting the disadvantaged and those isolated by mainstream society; (d) groups assisting the elderly and the sick; (e) activities promoting good citizenship in the young; and (f) projects promoting sport and artistic development.

The Trustees also need to be satisfied as to the suitability and strengths of the applicant organisations, having particular regard to the enthusiasm, vision, efficiency and resourcefulness of the applicant organisations. Under their current policy the Trustees will not normally give a grant to an organisation which has received a grant within the previous two years in order to try to distribute grants as widely and fairly as possible.

Unless otherwise advised, it is assumed that recipients come under the jurisdiction of the UK Tax system. By signing the application form you are certifying that to the Trustees. If you are tax resident in another jurisdiction, please advise us of which country and please detail your tax reference number there below. When such information is given, the Trust has a

legal duty to report any payment to the relevant Tax Authorities in certain overseas jurisdictions.

Tax Jurisdiction _____

Tax Reference Number _____

Applications on the attached form should be lodged in hard copy form to:

Angela Bell, Trust Manager

Applications will be acknowledged and if falling within the above criteria will be considered at the next meeting of Trustees.

The Trustees meet three times each year, normally in March, August and December. To reduce administration the results of applications are intimated only to successful applicants and that is done within ten days of the meeting.

Application Form

The Applicant and Project

1. Full name of organisation:

2. Registered Charity number:

3. General Aims:

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4. Particular project to be funded by this application:

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(Identify the geographical area and so far as possible the number of people to benefit and how they will benefit

5. Explain the timetable for carrying out the particular project:

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(Identify a starting date, subject to funding, and likely duration)

6. Have all consents (from your headquarters, local authority etc.) been obtained for the project? YES/NO

If not, what requires to be done?

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7. Please give the name and address of the person who will supervise the project:

Name:

Address:

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The Applicant's Financial Position

1. Detail the sum to be spent on the project (schedules may be attached, if available, to give this information:

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Total estimated cost £ _____

2. Detail under general headings the funds already available for the project and general sources, e.g. government grant, local fund raising, trust donations:

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Total estimated fund £ _____

3. Indicate other possible sources to which application has been made for funding to cover the balance required for the project:

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4. State the amount of grant you would like the trustees to give, bearing in mind that the normal grant is up to £2,500 but may be exceeded for major projects.

£ _____

5. Established applicants must attach a copy (not more than four sheets) giving from their most recent audited accounts the income and expenditure details for one year and balance sheet at the end of that year. Please give a breakdown showing expenditure on (a) promotion; (b) administration; and (c) direct benefit in terms of your objectives unless that information is evident in the accounts. Recently established applicants with no such accounts must give information in this section about general funds already held and the proposed use of these funds.

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Contact with the Applicant

1. Full name of person applying on behalf of the applicant:

Ms/Mrs/Mr

2. Address for correspondence:

.....

..... Post Code

3. Position in the organisation (Chair/Secretary/Treasurer etc.)

..... When appointed

4. Telephone Number (day):

5. E-mail address of Charity

6. Website address of Charity

Undertaking

I the above named contact person confirm (a) that to the best of my knowledge and belief the information contained in this application form and supplied with it is fair and accurate; (b) that I have been authorised by the applicant to make this application; and (c) that the trustees may disclose any grant to third parties.

Signature Date

- Note: (1) As the trustees are most likely to fund a time-limited specific project rather than ongoing normal revenue expenditure, this form has been prepared on the basis of such a project. The trustees may exceptionally consider funding for a longer lasting project in which case the applicant should adapt the form as necessary.
- (2) Applicants may submit such additional documentation as they consider important to inform the trustees about aspects of the project not otherwise covered in the application form.
- (3) The application form with supporting documentation should be lodged in hard copy form with Thorntons Law LLP, Whitehall House, 33 Yeaman Shore, DD11 4BJ (Ref. Angela Bell).

To be sent to Angela Bell at the address below by 1 September 2019

Contact:

Angela Bell
Trust Manager
For Thorntons Law LLP

Whitehall House
33 Yeaman Shore
Dundee
DD1 4BJ

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Email: abell@thorntons-law.co.uk
