

Thorntons Law LLP
The Williamina McLaren Trust
Scottish Charities Office No: SC003233

Background information for applicants

G Roberts
Thorntons Law LLP
Administrators and Secretaries
TEL: (01382) 229111
FAX: (01382) 202288
Email: groberts@thorntons-law.co.uk

Whitehall House, 33 Yeaman Shore
DUNDEE
DD1 4BJ

If telephoning please ask for Mr Glyn Roberts

Mrs Williamina McLaren's Trust exists to support organisations recognised by the Inland Revenue as charitable institutions. 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 in Angus. 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.

Applications on the attached form should be lodged in hard copy form with Thorntons Law LLP, Whitehall House, 33 Yeaman Shore, Dundee, DD1 4BJ (Ref: GLR), Secretaries to the Trustees, Tel: 01382 229111, who will readily provide any other information required by the applicant.

Applications will be acknowledged and if falling within the above criteria will be considered at the next meeting of Trustees. The Trustees meet every six months, normally in March and September.

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:
.....

8. 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 _____

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.

£ _____

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):

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 to, Thorntons Law LLP, Whitehall House, 33 Yeaman Shore, Dundee, DD1 4BJ, ref: GLR, Secretary to the Trustees, Tel: 01382 229111 DD: 01382 346299), who will readily provide any other information required by the applicant.