



# Application form for assistance

Grants to individuals in need are issued at the discretion of the Trustees and with due accordance to the constitution and to the Charities Act 2011 and consequently your application may or may not be approved. Do not hesitate to contact the Trust should you have questions about the form or the support available. If you live in the UK or Republic of Ireland, a representative of the charity may be able to visit you and assist you with the completion of your application. Please complete in black ink and feel free to attach additional information.

## Applicant's contact details

Last name:	Mr/Mrs/Ms/Miss/other:
First name:	Middle name(s):
Address:	
Postcode:	
Phone number(s):	Email:

### Complete if you are a member, former member, graduate, student or existing or former employee of The Chartered Governance Institute UK & Ireland

Please state your CGIUKI membership number if known:

If you are an existing or former employee of the Institute, please provide details of the dates of your employment and, if appropriate, reason for leaving:

From:	To:
Reason for leaving:	

### Complete if you are connected to a past or present member or employee of the Institute

Please state their name and connection to the Institute, your relationship and their membership number. If appropriate.

Name:

Current or former:  member or  graduate or  student or  affiliate or  subscriber or  employee

Relationship: Membership number:

### All applicants to complete the following questions

If you or a member of your family have previously applied to this charity for support please provide the year of the application: Year:

Are you, or have you been, a member of any other professional or trade bodies? Please provide details:  Yes  No

What is your current or former occupation?

Have you served at any time in the armed forces? Please provide details:  Yes  No

## You and your family

Your date of birth:

Age:

Status: Single/married/widowed/partner

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**Your general health:** Please state any disability or health difficulties that you or any of your dependants may experience, as this sensitive information may help to inform the Trust on your additional financial needs.

**Dependants:** Please provide details of persons who are dependent upon you (in whole or in part) for financial support. Please include details of your wife/husband/partner in this section.

Full name	Relationship (Mother, son etc)	Age	Occupation	Do they live with you?
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

**Next of kin:** Please provide details of your next of kin, if you are happy for The Chartered Secretaries' Charitable Trust to contact them in an emergency.

Name:

Their relationship to you:

Daytime phone number:

Email:

Home address:

Postcode:

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**Support from The Chartered Secretaries' Charitable Trust:** The Trustees will consider any request, from regular financial support to help with a specific item or need. Please provide details of your request.

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## Your income, savings and investments

**Income:** Provide details of all your income, and that of any partner or other family member who is living with you and contributing to the household expenses. Provide details after deduction of Income Tax and National Insurance. Please also indicate how often you receive payment. You may be requested to supply original copies of bank statements to support your application.

Description of income	Self	Other family member	Please tick			Other – please state:
	£		£	Per week	Per month	
Earnings after deductions						
State pension						
Occupational pension						
Pension credit						
Housing benefit						
Council tax benefit						
Attendance allowance						
Any other state benefit or tax credit – please state:						
Help from other charities. Please also provide details of any applications made.						
Help from family members						
Regular income from savings						
Other income – please state:						

**Your savings:** Please give details of your savings or income producing assets (e.g. bank or building society, current and deposit accounts, insurance policies, stocks and shares or property).

Type of savings and/or investments	Amount or current value of your savings:

**Property:** If you own your home and/or any other property, please provide details along with the current estimated value(s)?

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## Your expenditure and details of any debts

**Expenditure:** Provide details of your expenditure. Include all your liabilities. We would welcome details of any regular expenditure items that are specific to any special needs (for example, costs associated with special dietary requirements or medical conditions).

Description of expenditure	Self	Other family member	Please tick			Other – please state:
	£		£	Per week	Per month	
Rent/care home fees						
Mortgage						
Council tax						
Water rates						
Electricity						
Gas/oil						
Buildings insurance						
Contents insurance						
Travel costs						
Other expenditure – please state:						

**Debts:** Please indicate all your debts. Include current loans from The Chartered Secretaries' Charitable Trust and any outstanding mortgage on your home, if applicable.

Type of debt: Credit card, mortgage and loans etc.	Original amount	Amount outstanding	Monthly repayment

I confirm that all the statements I have made are true and accurate and that, apart from where stated, I have not made an application to any other charity in Great Britain or elsewhere. I agree:

- To receive a visit from one of the charity's volunteers, who will provide the Trustees with an independent report.
- To inform you of any changes in my circumstances that might affect any decision to grant me assistance.

In order for the Trust to be able to consider your application it will be necessary to confirm your relationship to The Chartered Governance Institute UK & Ireland by viewing details held on the Institute's membership database. Do you give consent to the Trust to view such records held on the Institute's database for this purpose?  Yes  No

I understand that where other charities are stated, The Chartered Secretaries' Charitable Trust might contact them to consider mutual support where appropriate. Do you give consent for this?  Yes  No

I understand that all information provided to The Chartered Secretaries' Charitable Trust will remain confidential and will only be held, used or disclosed, to assist with the administration of my requests and in accordance with the Data Protection Act 2018 (DPA) and the Privacy and Electronic Communications Regulations.

Signed:

Date:

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# Privacy notice for applicants who seek financial assistance

Notes for applicants. These notes are to help you understand how we collect and use personal information. Our full Privacy policy statement along with our Data protection policy is available on our website and on request.

## Your privacy is important

Personal data includes any information that identifies you personally, such as your name, address, email address or telephone number. The Chartered Secretaries' Charitable Trust ('the Trust') respects the privacy of your personal information and complies with Data Protection Act 2018 (DPA) and the Privacy and Electronic Communications Regulations.

## This document is for applicants to the Trust and explains:

- why the Trust requests information from you,
- where else it may obtain information about you,
- how it uses the information including keeping it safe and secure and
- your rights regarding the information we hold about you.

## Why the Trust requests information from you

The Chartered Secretaries' Charitable Trust is a charity registered with the Charity Commission for the relief and prevention of poverty. It serves The Chartered Governance Institute UK & Ireland members, graduates, students, employees and their families to relieve and help prevent financial difficulties. As such, trustees have a legitimate interest in retaining your personal data as appropriate, to ensure that assistance is only provided to those who have a relationship to the Institute and that they have a genuine financial hardship. This means that the Trust needs to ask questions in respect of your household financial circumstances, so that the most appropriate level and range of support can be provided to you.

The Trust requests that you give details of your next of kin, if you are happy for the Trust to contact them in an emergency. The Trust has on occasion not been able to contact a beneficiary. There might be many reasons for this, and the Trust would not want to automatically cease any support provided, without making further enquiries. If you do provide the details of your next of kin, we ask that you let them know you have done so.

The Trust asks if you have any dependants and whether you or your dependants have any health difficulties, as this sensitive information helps to inform the Trust on your additional financial needs. We also ask about your occupation, whether you have been a member of any professional body or have served in the armed forces. We only ask these questions, as from your replies, we might be able to signpost you to other charitable organisation who might also be able to help you.

## Where else the Trust may obtain information about you

The Trust receives and stores personal information supplied to us in writing, via email, via the telephone, in person or online. The Trust may also obtain information about you from The Institute, our volunteer visitors, other charitable organisations, or a supplier of a bespoke charitable service provided to you and made possible with financial assistance from the Trust.

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## **The Chartered Governance Institute UK & Ireland**

Trustees are unable to consider a request from someone who has no relationship to the Institute. The Trust therefore has a legitimate interest to confirm your relationship and can do so by viewing the Institute register of current and former members. If you are requesting assistance with payment of the Institute membership subscription, we request your consent to liaise with the Institute, to help maintain your membership while your request is being processed and if appropriate make payment direct to the Institute. Employees responsible for the administration of your requests to the Trust and for processing any agreed payments to you are also employed by the Institute.

## **Our volunteer visitors**

If you live in the UK or Republic of Ireland, we also ask for your consent to introduce you to one of our volunteer visitors, who would also be pleased to call on you and assist with the completion of the application form. Trustees recognise that for some applicants, it can prove difficult to express needs and circumstances in an application form, email, letter or telephone conversation. A face-to-face contact with one of the Trust's volunteer visitors can provide this opportunity to discuss your needs and to ensure that the Trust has a clear understanding of what these are. Trustees also find their views and recommendations invaluable when determining support.

## **Other charitable organisations and bespoke services**

You may have approached the Trust through another charitable organisation as they may have contacted the Trust on your behalf. Alternatively, if you have advised that you are in receipt of assistance from another charity, we ask you to give your consent that we might liaise with them, so that any support the Trust might provide is complementary to their support. Where the Trust has provided bespoke support delivered through a third party provider, we might request general feedback from the supplier to help inform the future delivery of bespoke services.

## **How we use the information, including keeping it safe and secure**

All information provided to the Trust or to the visitor, is held confidentially and used only to assist with the administration of your request and provision of any help. Each applicant is allocated a unique number which enables us to ensure that requests for support considered by the Support and Grants Committee are anonymised prior to consideration. Where the Trust may offer you bespoke support, the Trust will seek your permission to disclose these details to one of our trusted third party partners as appropriate. The Trust may be required to disclose your information without your express permission, but only where required to do so by law.

The Trust will securely maintain your records and review the information that it holds at least annually. Should your circumstances change, and assistance is no longer appropriate or required, records would continue to be held for a maximum of six years. After the six years, all paper and electronically held records would be securely destroyed. Please see our full Data Protection Policy for details.

## **Your rights regarding the information we hold about you**

You have the right to be informed about the processing of your personal data, request access to the information held about you, request rectification of any information that is inaccurate, request deletion of information or restrict processing at any point. You also have the right to move, copy or transfer your personal data, object to the processing and rights in relation to automated decision making including profiling. To find out more, refer to the Information Commissioner's Office (ICO) website:

<https://ico.org.uk>.

If you have any questions regarding this statement, wish to exercise your rights, or have any concerns on the accuracy and use of your data, please contact the Charities Officer, ([CSCT@cgi.org.uk](mailto:CSCT@cgi.org.uk)), telephone: 020 7612 7049 who is responsible for the day-to-day administration of the Trust.

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