

CHARITY AND TRUST FUNDS

1. EXECUTIVE SUMMARY

- 1.1 This report sets out the proposed method for the distribution of the charities and trust funds in the Helensburgh & Lomond area.
- 1.2 The recommendation is to agree the proposed distribution of the available funds.

CHARITY AND TRUST FUNDS

2. INTRODUCTION

- 2.1 This report sets out the proposed method for the distribution of the charities and trust funds in the Helensburgh & Lomond area.

3. RECOMMENDATIONS

- 3.1 To approve the proposed method for the distribution of the charities and trust funds shown in Appendix 1.

4. DETAIL

- 4.1 There are a number of trust funds for which a procedure requires to be established for both the identification of the recipients and the process for distribution of the income. This report set out the proposed method of distributing the charities and trust funds.
- 4.2 The Council administers a total of 4 charities and 7 Trust Funds in the Helensburgh & Lomond area which make up Argyll and Bute.

	Registered Charities	Trust funds
Helensburgh & Lomond	3	5
Council Wide	1	2
	4	7

- 4.3 The proposed distribution methodologies have been reviewed and the proposals will minimise the amount of time spent on the distribution of the various trust funds and charities. However, if there are opportunities in the future to combine or transfer trust funds a report will be brought to the Area Committee at the appropriate time.
- 4.4 The maintenance of the Cardross War Memorial is the responsibility of the Council and any maintenance work required is funded from the Roads and Amenity Services Central Repairs Account and on this basis it is proposed that the funds be transferred when maintenance work is being undertaken by the service.
- 4.5 Appendix 1 sets out the proposed method of distribution for each charity and trust fund.

5. CONCLUSION

- 5.1 This report sets out the estimated income for each charitable and trust fund and a proposed basis of distribution of the available funds.

6. IMPLICATIONS

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| 6.1 | Policy – | Sets proposed approach to distribution. |
| 6.2 | Financial - | Proposals for use of income set out in report. |
| 6.3 | Legal - | Proposes proper use of charity and trust funds. |
| 6.4 | HR - | None. |
| 6.5 | Equalities - | None. |
| 6.6 | Risk - | None. |
| 6.7 | Customer Service - | None. |

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Appendix 1 – Analysis of Charities and Trust Funds