

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 Oban, Lorn and the Isles area.
- 1.2 The recommendation is to consider and agree the proposed method for the distribution of the charities and trust 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 Oban, Lorn and the Isles area.

3. RECOMMENDATIONS

- 3.1 To consider and agree 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 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

Trust Funds and Charities

Name	Purpose	Distribution Proposal	Capital (Restricted) Funds £	Accumulated Funds for Distribution £
Kilmore and Kilbride	To meet the expenses in keeping Kilbride Burial Ground in order.	Transfer income to the Friends of Kilbride Church.	400	99
Miss Christina McKays Trust	The upkeep of the graves of the MacKays of Glenure, Fasnacloich and those of Mrs Margaret MacIntyre of Duror and her sisters, all in Achnaba Churchyard Ardochattan.	Transfer income to Roads and Amenity Services annually when it is confirmed that the cemetery is being maintained. If no work is being undertaken do not make the transfer until such time as work is to be carried out.	300	1,211
Archibald Dow Bequest	To be distributed to the poor of Taynult.	Consider how to identify recipients.	751	1,231
James McKechnies Trust	For upkeep of family headstones and lairs in Pennyfuir Cemetery.	Transfer income to Roads and Amenity Services annually when it is confirmed that the cemetery is being maintained. If no work is being undertaken do not make the transfer until such time as work is to be carried out.	100	-14
John of Lorn Bequest	Income to be dispursed for the benefit of poor persons resident in the Burgh of Oban.	Consider how to identify recipients.	8,989	15,405
Miss Mary A McNivens Trust	For the maintenance of her two family lairs in Tiree burial ground.	Transfer income to Roads and Amenity Services annually when it is confirmed that the cemetery is being maintained. If no work is being undertaken do not make the transfer until such time as work is to be carried out.	600	96
Miss Agnes Angus Bequest	For purposes of public utility and for the benefit and advantage of the community of Oban	Advert placed in Oban Times in October 2017.	1,000	37,811
Coals for Poor - Oban	To supply coals for the poor of Oban.	Consider how to identify recipients.	1,334	1,931
McCaig Trust	Contribute towards the cost of a library and institute in Oban.	Transfer to Live Argyll. A statement setting out how the funds have been used would be provided annually.	68,784	13,732
Mrs Mellors Bequest	Providing annuities 'of not less than £10 and not more than £15 for respectable and well deserving widows without children and worthy of assistance'.	Proceed with the re-organisation of the charity.	1,700	72,012
Miss M M Cameron	Bequest to Evantide Home, Salen, Mull. Care home no longer exists. Distributions could perhaps be made to the progressive care centre.	Transfer income to Roads and Amenity Services annually when it is confirmed that the cemetery is being maintained. If no work is being undertaken do not make the transfer until such time as work is to be carried out.	185	278
MacDougall Trust	To provide an eventide home in the Ross of Mull area for the accommodation of 12 aged persons. Care home no longer exists. Distributions perhaps could be made to the progressive care centre.	Proceed with the re-organisation of the charity.	50,000	710,007
Miss Flora McLucas Bequest	For the benefit of Dunaros, Salen. Care home no longer exists. Distributions could perhaps be made to the progressive care centre.	Transfer income to Adult Care annually.	100	2,220
Dugald McPhail Memorial Fund	For the maintenance of the monument.	Establish if maintenance is being carried out on the monument and use funds to offset costs of maintenance.	15	407
MacKinnon Ledingham Bequest	For relief of aged persons in the Ross of Mull. Currently Local Minister provides list of deserving recipients who each receive £10.	Local members to identify elderly people on Ross of Mull who meet the criteria of poor and distribute between them using vouchers	2,000	4,295