
CHARITABLE TRUSTS, BEQUESTS AND TRUST FUNDS DISTRIBUTION ARRANGEMENTS

1.0 EXECUTIVE SUMMARY

- 1.1 The Mid Argyll, Kintyre and the Islands Area Committee are Trustees for a number of Charitable Trusts, Bequests and Trust Funds. Officers continually seek to simplify and update processes where possible to ensure ongoing compliance with the original terms of the bequests and to reduce the administrative burden of the management and distribution.

CHARITABLE TRUSTS, BEQUESTS AND TRUST FUNDS DISTRIBUTION ARRANGEMENT

3.0 INTRODUCTION

3.1 The Mid Argyll, Kintyre and the Islands Area Committee are Trustees of 19 Charitable Trusts, Bequests and Trust Funds with an estimated unrestricted balance of around £139K. This report invites Trustees to consider distribution arrangements for 4 of these funds.

4.0 RECOMMENDATIONS

4.1 The Mid Argyll, Kintyre and the Islands Area Committee are asked to:

1. agree the proposals for distribution arrangements for the Campbell Bequest and the McNeil Bequest outlined within this report,
2. note that a review of the updated distribution arrangements for the aforementioned funds will be undertaken and reported to the Area Committee following the first 12 months of operation;
3. agree that applications be invited from suitable organisation for a one off project that would meet the terms of the Fisher Bequest and that on submission this proposal will be subject to consideration by the Area Committee; and
4. note that officers are working towards preparing distribution arrangements for the Macalister Mortification for later consideration by members.

5.0 BACKGROUND

5.1 Due to the restrictive nature of some funds, specifically the Campbell Bequest, McNeil Bequest, the Macalister Mortification and The Fisher Bequest, difficulties had been faced in establishing suitable distribution arrangements. Consequently, Officers from Legal and Regulatory Support had been in dialogue with both The Scottish Charity Regulator (OSCR) and Lord Advocates Office in an attempt to

the costs themselves and repay the Trust the costs. The level of risk is considered to be acceptable

10.8 **Customer Service** – None

10.9 **The Rights of the Child (UNCRC)** – None

Douglas Hendry

Executive Director with responsibility for Legal & Regulatory Support

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Policy Lead - Councillor Alastair Redman

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Appendices

Appendix 1 – Definitions of Poverty

Appendix 2 – Parish of Kildalton and Oa

Appendix 3 – Parish of Inverary