



## Grant aid policy for assistance

The Chartered Secretaries' Charitable Trust will consider requests for financial support from individuals who find themselves in need who:

- are or have been members on the register or registers of the Institute within UKRIAT.
- or current or former affiliate members, graduates, professional subscribers, students or employees of the Institute within UKRIAT, who have maintained a minimum continued relationship with the Institute as described above, of a period as defined by current guidelines. Trustees are only empowered to utilise income and capital appreciation from 1 August 2013 to support these new classes. Priority will therefore be given to:
  - Graduates who have graduated within the last four years.
  - Affiliate members who have been affiliates for at least two years.
  - Professional subscribers who have been professional subscribers for at least four years.
  - Students who have been students for a minimum of two years and a maximum of ten years, and who are or had been actively pursuing the ICSA qualification scheme.
  - Employees and former employees of ICSA in the UK, or their subsequent employer being a successor to ICSA in the UK arising as a result of any constitutional change, who were or had been continuously employed for at least four years. Preference will be given to those who have reached retirement age and
  - those who are the widows, widowers, surviving civil partners, issue or other dependants of such individuals as described and defined as above.

Grants to individuals are issued at the discretion of the trustees and with due accordance to the constitution and to the Charities Act 2011. Grants are reviewed when circumstances determine and at least annually.

Trustees delegate the consideration of all applications for assistance to the Support and Grants Committee, which holds a minimum of three meetings a year. Between meetings, the Chairman of the Support and Grants Committee has the power in urgent cases to make grants to a maximum amount of £1,000 and interest free loans to a maximum amount of £5,000 in any one case, which are later noted by the Committee. Where there is an emergency and the Chairman is unavailable, the Charities Officer seeks a decision from either of the Chairman of Trustees, the Deputy Chairman of the Support and Grants Committee and the Company Secretary, who have like power to make a decision.

In respect of the total level of grant aid, grants and loans will continue to be made up to the annual sums available as defined by the trustees.

The Grant aid policy is reviewed every three years, or earlier at the discretion of the Chairman of Trustees and the Chairman of the Support and Grants Committee.