



The Old Stoic Benevolent Trust

Application form for assistance by way of grant

Our Benevolent Trust is for former pupils, former permanent members of staff and their immediate dependents experiencing or at risk of financial hardship. Please take a moment to read the guidance notes before completing your application.

To assist the Trustees in the consideration of your application please complete, sign and date this document and return it, together with any supporting documents as soon as possible to:

Old Stoic Benevolent Trust, Old Stoic Office, Stowe School, Buckingham, MK18 5EH

Please be aware that this form must be completed fully for your application to be considered. If you have any questions or need help, please email osbt@stowe.co.uk or call 01280 818252 to speak to a member of staff.

About You

Title		Forename(s)	
Surname		Previous Name(s)	
House		Year	
Other qualifying status¹			
Date of Birth		NI Number	
Postal Address			
Evidence of identity provided with this form (copies, not originals please)	Select option: <input type="checkbox"/> Passport <input type="checkbox"/> Photo-card driving licence <input type="checkbox"/> Other government issued photo ID including shotgun and firearms certificates <input type="checkbox"/> Any two of: utility bills or official correspondence addressed to you.		
Home Telephone			

¹ Former permanent members of staff of Stowe School and the dependants of former pupils and the dependants of permanent members of staff may also qualify. Please explain your qualifying connection. Dependants should provide evidence of their connection to a former pupil or member of staff, such as copies of entries in registers of births, marriages and civil partnerships if available.

Mobile Telephone			
Email Address			
Marital Status			
Children/dependants			
Employment Status			
Industry		Company Name	
Position			
If you are a member of any professional bodies, please list these below:			
Are you ordinarily resident in the UK and, if a grant is made, would it be paid into an account maintained in an account based in the UK and spent in the UK? If not further verification of identity, bank account and use of grant may be required.			

About your Situation

How much funding are you applying for? (£500 maximum)	
Funding theme (tick the relevant theme)	<input type="checkbox"/> Equipment <input type="checkbox"/> Amenities <input type="checkbox"/> Debt <input type="checkbox"/> Household <input type="checkbox"/> Travel and subsistence
What specifically will the money be used for if your application is successful?	
If the application is successful, the Trustees may need to check that the money has been used for the intended purpose. If a grant is made, would you be able to provide receipts for how you used it or what other way would you could show the Trustees how it was used?	

Reasons for your application: the Charity Trustees' have identified funding priorities which are listed below. Please tick to indicate which area(s) apply to you.

If none of the categories are relevant please tick "other" and provide brief details of the personal circumstances that have led you to apply to this fund. Once we have received your application we may ask you for further information.

- You have no other or sufficient support (please provide brief details of other support sought and not available/sufficient)-
- You have physical or mental disability or health issues -
- You are recovering from illness or addiction -
- You are a care-giver -
- You are vulnerable including as a result of age or domestic circumstances -
- You are unemployed -
- Other (please provide brief details below) -

Please list below any other organisations you have approached for support and list funds secured.

Finances

Please provide full details of your own income, including any salary payments, welfare benefits or other income. Please continue on to a separate sheet if you need to so:

Do you own your own home? If so, please provide an indication of its value. Please also provide any outstanding mortgage or loans secured against the property:

Do you have any saving, shares or investments? If so, please provide details:

Do you have any other assets, such as possessions of high worth? Please provide details:

Please provide full details of your expenditure. You may wish to consider the following:

	£ per month	Total outstanding
Mortgage payments		
Rent		
Secured loans		
Unsecured loans		
Pension contributions		
Credit card payments		
Savings/Investments		
Council Tax		
Electricity		
Gas		
Water		
Telephone/internet		
TV licence/satellite TV		
Home/contents insurance		
Life assurance		
Motor insurance		
Travel expenses		
Vehicle running costs		
Child care		
Child maintenance		
Food and clothing		

Other (please specify)		
Please give details of any other debts, which have not been explained so far:		

Additional Information

Have you applied to the Old Stoic Benevolent Trust in the past?	
If the Old Stoic Benevolent Trust is unable to help, can we refer you to other relevant charities?	
Where did hear about the Old Stoic Benevolent Trust?	

Declaration

To the best of my knowledge and belief I, the undersigned, declare that the particulars given above are a true and accurate statement of my current circumstances.

Name _____

Signature _____ Date _____

Administrative use only

This form was received and processed by:

Name _____

Signature _____ Date _____

IT IS ESSENTIAL THAT ALL SECTIONS OF THIS FORM ARE COMPLETED

Please send completed application form and any supporting documents to:

Old Stoic Benevolent Trust, Old Stoic Office, Stowe School, Buckingham, MK18 5EH

The Old Stoic Benevolent Trust will do its best to process this application within 30 days of the receipt, assuming all required documentation has been included with the request for assistance.

The Old Stoic Benevolent Trust Constitution can be found here:

<https://www.stowe.co.uk/School/Old-Stoics/OS-Benevolent-Trust>

The Old Stoic Benevolent Trust Grant Making Policy can be found here:

<https://www.stowe.co.uk/School/Old-Stoics/OS-Benevolent-Trust>

Guidance Notes for Applicants Completing Benevolent Trust Application Forms

We understand that it may not be easy for you to make this application, and we want to do all we can to assist you in your time of need, so if you follow these guidelines it will make your job easier, and help the Benevolent Trust Trustees to make an informed decision, and get help to you as quickly as possible.

- The Benevolent Trust has been set up to assist members who are in need of 'relief of poverty and financial hardship' and funds are available on the basis of donations agreed by the Trustees, to members of the Old Stoic Society, who live in the UK. The application has to be on an individual basis, and will be addressed specifically in relation to a member's personal circumstances.
- The application form must be submitted to *Old Stoic Benevolent Trust, Old Stoic Office, Stowe School, Buckingham, MK18 5EH*. An official will then contact you to discuss the application.
- Please provide as much information as possible on the application form. The more information the Trustees have regarding your circumstances, the clearer they can be in considering your application, and the more chance you have of a successful outcome.
- Please be specific about the amount you are requesting, what it is for and the reason why. You should also provide details of your monthly income and expenditure, details of any savings, assets and debts.
- Be specific about other organisations you have approached. Who are they and how have they responded.
- Please provide as much documentary evidence in support of your application as you are able. If you are able to provide copy wage slips and bank statements to show your recent income and current financial position, then please do so. If you are asking for a donation to assist you with the payment of a specific cost, then please provide documentation in support. For example, if you are in arrears with your rent or mortgage, you should try to provide a letter from your landlord or mortgage provider confirming the amount of arrears on your account. Other evidence of severe financial hardship might include such documents as overdue utility bills, letters from creditors, Court Orders or a notice of eviction.
- If in doubt, please contact the Old Stoic Office on 01280 818252 or osbt@stowe.co.uk

Privacy Notice for Applicants

The following section is to help you to understand how the Old Stoic Benevolent Trust (the Trust) uses the information which we hold about you. The Trust is separate from the Old Stoic Society and from Stowe School. If you have any questions about this notice please contact the Old Stoic Benevolent Trust on 01280 818252 or osbt@stowe.co.uk

What information do we hold about you?

We will use the information which you provide on this form and which is included in any other documentation that you provide to us. For example, you may send us bank statements and utility bills.

We may also use information held about you by the Old Stoic Society and Stowe School. For example, your dates of attendance or employment at Stowe School to check that you are eligible to apply for a grant.

Why do we use your information and what is our lawful basis?

Our primary reason for using your information is to assess your application for a grant, to correspond with you about its progress, and if applicable, to provide you with a grant. Such processing is necessary for our legitimate interest in managing the application process and fulfilling our charitable purposes. We also consider that this processing is necessary for a task in the public interest.

We will also use your information to comply with our legal and regulatory obligations. Our lawful basis for this processing is that it is necessary to comply with our legal obligations. We also have a legitimate interest in ensuring that we satisfy our regulatory and legal obligations. For example:

- we may need to carry out due diligence checks on you to make sure that the Trust's funds are being used appropriately. This may involve checking your identity and connection with Stowe School to make sure that you qualify for a grant; and
- if you receive a grant we may need to check how the funds have been used. For example, we may ask you to provide us with receipts for purchases.

Sharing your information outside of the Trust

We appreciate that the information you provide (for example, when you complete your application form) is sensitive and confidential. We will therefore only share this information outside of the Trust where we have a good reason for doing so and our sharing complies with data protection law.

We may share your information as follows:

- to fulfil our obligations to the Charity Commission who regulate our activity. This use of your information is to comply with our legal obligations and for our legitimate interest in making sure that we satisfy our regulatory and legal obligations;
- to seek advice from our lawyers or other experts. Such processing is necessary for our legitimate interest in making sure the Trust is well run and that we comply with our legal and regulatory obligations;
- to notify our insurers of relevant incidents. This is necessary for our legitimate interest in complying with our agreement with our insurers and making sure that we have insurance cover; and

- to assist the police in exceptional circumstances regarding the prevention and investigation of crime and the prosecution of offenders. Such processing might be necessary to comply with a legal obligation and for our legitimate interest in co-operating with the police.

Our legal bases for using more sensitive information about you

We must comply with an additional legal basis where we process special categories of personal information. These special categories include: personal information revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, health information, and information about sex life or orientation.

In most cases we will rely on it being necessary for reasons of substantial public interest for us to use this type of information. This is also the case if we use information about criminal convictions and offences.

For how long do we keep your information?

We will retain your information for as long as necessary to fulfil the purposes outlined above. This will usually be for 6 years.

However, in exceptional circumstances we may retain your information for a very long time. For example, if we consider that it might be required in relation to legal claims.

Further information

Please see the Privacy Notice for Old Stoics, Former Staff and Former Parents for further information. Specifically, to find out what rights you have in your personal information and how to contact the supervisory authority (the Information Commissioner's Office) if you have any concerns. This privacy notice can be found at www.stowe.co.uk/policies