

## User Guide – Maintain Trustees, Connections and External Advisors

Use this form to update, add or remove charity trustees, or to update information relating to connections and external advisors.

In this form there are four tabs to be completed: Trustees, Advisors, Connections and Declaration.

Fields marked with a red asterisk are mandatory and must be completed.

This symbol indicates that there is further information available if you hold your mouse over it.

Trustees

What is the minimum number of trustees your organisation must have, according to your Governing Document? \*

1

Added Trustee(s)

No Added Trustee(s) in this list

Add Trustee

Updated Trustee(s)


No Updated Trustee(s) in this list

Update Trustee

Deleted Trustee(s)

No Deleted Trustee(s) in this list

Delete Trustee

 Save Draft

The save draft option appears on each tab of the form and allows you to save your progress. (Note: there is no automatic save so we recommend that you save drafts regularly as you work through the form).

## 1. Trustees

In this tab you can add new charity trustees, update existing trustee details, or delete trustees who no longer hold that position in your charity.

The minimum number of trustees which your charity must have is usually stipulated in your governing document. If it is not, please enter the number of trustees currently in your charity.

**To add a new trustee**, click on 'Add Trustee' to open the pop-out – enter the required details and 'save'. Continue this process until you have added all new trustees.

***Please note:** To change the role of an existing trustee e.g. from company secretary to chairperson, you will need to delete the trustee and then add them again. In this case, the system will require you to upload a declaration for each trustee being added, however because this is not a new trustee, just a new role, you do not need to upload a signed declaration, you can instead upload a pdf, which does not need to be signed, stating 'no new trustee being added, just a change in relationship.'*

A full residential address (including Eircode) is required for each trustee.

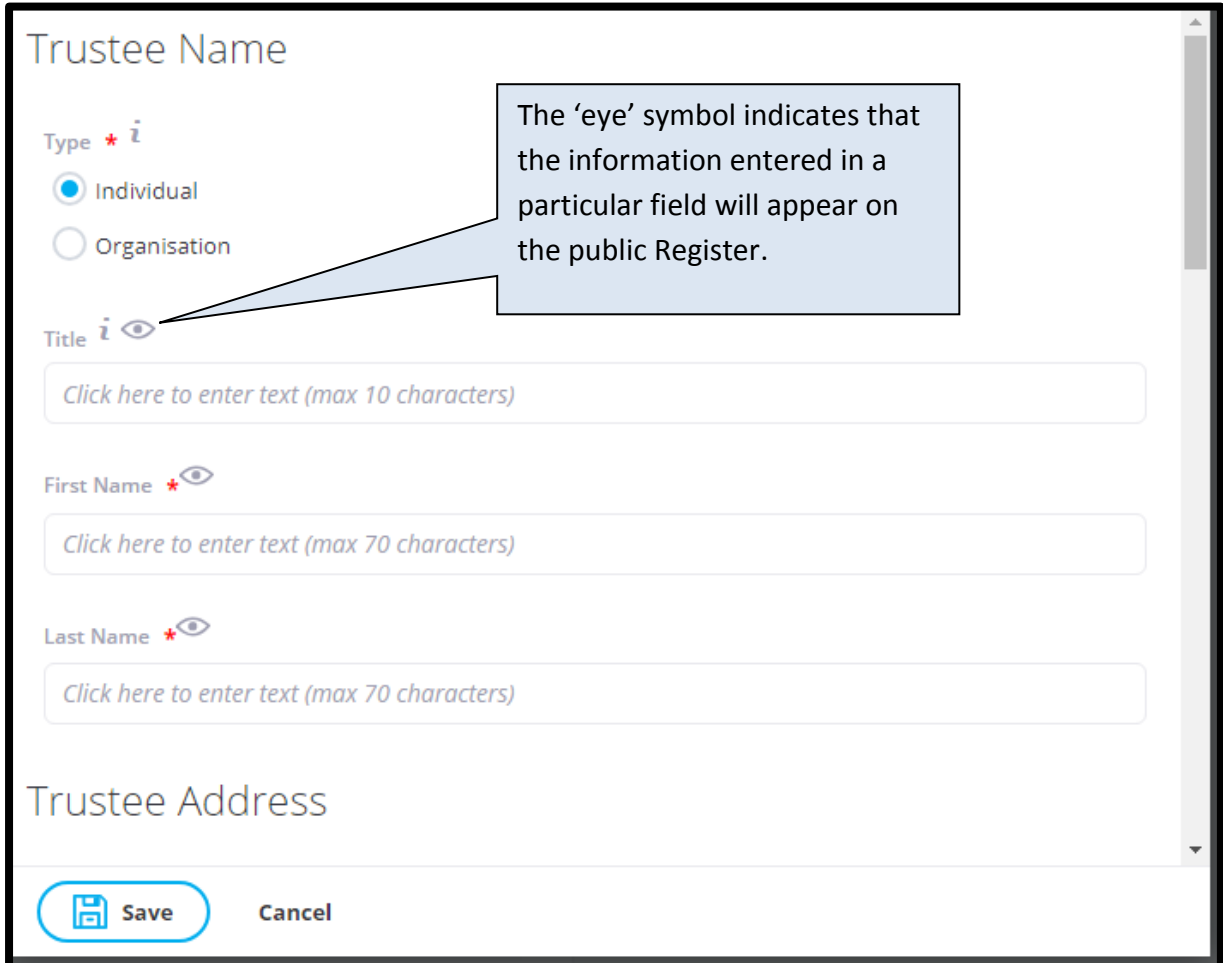
You can enter the address or Eircode in the Search Address bar and then click the result to autofill the address.

If the address is in an area with many non-unique addresses (such as a rural townland) you will need to enter your Eircode into the Search Address bar, or else enter the address manually, remembering to include the Eircode. If you do not know your Eircode, please click on Eircode Finder (<https://finder.eircode.ie>) to help you find it.

Trustee addresses will not be published on the public register. Addresses are for internal use only.

Please ensure that the start date (the date the individual became a trustee) is also specified.

One trustee must be assigned the role of Chairperson. If your organisation is a company, one trustee must be assigned the role of Company Secretary.




Trustee Name


Type \* *i*

Individual


Organisation

Title *i* 

*Click here to enter text (max 10 characters)*


First Name \* 

*Click here to enter text (max 70 characters)*

Last Name \* 

*Click here to enter text (max 70 characters)*

Trustee Address

 Save Cancel

The 'eye' symbol indicates that the information entered in a particular field will appear on the public Register.

A full residential address (including Eircode) is required for each trustee.

You can enter the address or Eircode in the Search Address bar and then click the result to autofill the address.

If the address is in an area with many non-unique addresses (such as a rural townland) you will need to enter your Eircode into the Search Address bar, or else enter the address manually, remembering to include the Eircode. If you do not know your Eircode, please click on Eircode Finder (<https://finder.eircode.ie>) to help you find it.

Trustee addresses will not be published on the public register. Addresses are for internal use only.

Please ensure that the start date (the date the individual became a trustee) is also specified.

One trustee must be assigned the role of Chairperson. If your organisation is a company, one trustee must be assigned the role of Company Secretary.

Once you have all the new trustees added you must upload a PDF copy of a signed Trustee Declaration for each new trustee – click on ‘Upload File’, select the file and upload. If you are adding more than one trustee the declarations can be scanned into one PDF and uploaded together, or you can upload all of them as separate documents. Documents for upload must be in PDF and less than 5mb in size.

For clarity – the only time a trustee declaration needs to be completed and signed by a trustee is when they are being added to the charity registration for the first time i.e. when they are a completely new trustee. If you are changing the role of a trustee you do not need to upload a signed declaration, you can instead upload a pdf, which does not need to be signed, stating ‘no new trustee being added, just a change in relationship.

## **Schools – Board of Management**

If your organisation is a school with a roll number, the members of the Board of Management are the charity trustees. Members of the Board of Management do not need to complete and upload a Trustee Declaration.

**To update an existing trustee** click on ‘Update Trustee’ to open the pop-out – select the trustee from the drop down list, enter the required details and ‘save’.

**To remove an existing trustee** click on ‘Delete Trustee’ to open the pop-out – select the trustee from the drop down list, enter the required details and ‘save’.

## 2. Advisors

Here you can add, update or delete any advisors that your organisation might have. This could be a solicitor, accountant, auditor or other financial advisor.

Click on the relevant option to open the pop- out, enter the required details and 'save'.

## 3. Connections


You are also requested to outline any connections (including family, business and employment relationships) which exist between your trustees or the founder of your organisation and any of your employees or suppliers of goods or services.

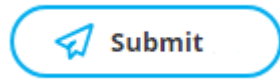
In this tab you can add, update or delete any such connections within your organisation.

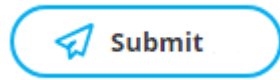
If you are adding a new connection you will need to specify the person/organisation's relationship to your charity, what they are contracted to do, and how much they are paid. You will also be required to provide a copy of the board minutes of the meeting where this relationship was approved.

## 4. Declaration

This section allows you to review and certify the information you have provided. If you are satisfied that it is correct, and it has been approved by the trustees for submission, you should submit your changes. The privacy terms and Statement of Information Practices should be read and accepted.

Once you are satisfied with this you can click on  **Preview** to download a PDF of your information.



Then click on  to submit your changes to the Charities Regulator. You will receive a notification when it is processed.