

## User Guide – Authorised Filer Form

This form should be used by a representative of a registered charity, such as an accountant or solicitor, to apply for access to a charity account to file reports and forms on behalf of the charity. (A letter of approval signed by at least one of the charity trustees must be uploaded with the form).

Please note: If the individual/firm is only going to file reports and forms on behalf of one charity, the charity administrator must add the individual/firm as a new user to the charity's account, and then the individual/firm makes the application to be an authorised filer for the charity.

If the individual/firm is working with multiple charities, then they must create their own account, and then apply to be an authorised filer for the relevant charity or charities.

In this form there are two tabs to be completed: Authorisation and Declaration

### **1. Authorisation**

The details in the form are pre-populated and cannot be edited – if something is incorrect you will need to amend it within the 'Account' area of your dashboard first, before you complete and submit the Authorised Filer form.

A PDF copy of a letter on the charity's headed paper, confirming that you have the authorisation of the charity trustees to act on their behalf, signed by at least one of the charity trustees, must be uploaded with the form.

Suggested wording for the letter of authorisation:

*ON CHARITY'S HEADED PAPER*

Dear Charities Regulator

We confirm that {FIRSTNAME SURNAME} of {NAME OF FIRM} is authorised by the charity trustees to file annual reports and submissions on behalf of the charity.

We also hereby authorise the Charities Regulator to communicate with {FIRSTNAME SURNAME} with regard to any queries arising on the annual report or other submission which they file on behalf of the charity.

This letter of authorisation is signed on behalf of all of the charity trustees by:


TRUSTEE SIGNATURE

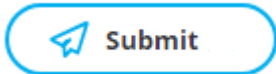
PRINT NAME OF TRUSTEE

DATE

## 2. Declaration

This section provides a review of the information submitted and asks you to certify that all the information provided has been checked by the trustees, is correct and is complete to the best of your knowledge and that all trustees agree to this submission and have read and accept the privacy terms and Statement of Information Practices.

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

Then click on  to submit the form to the Charities Regulator.

You will receive notification when it is processed.