

Iontaobhaithe, Baint agus Comhairleoirí Seachtracha a Chothabháil – Treoir Úsáideora

User Guide – Maintain Trustees, Connections and External Advisors

[Gaeilge](#)

[English](#)

Gaeilge

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.

The screenshot shows the 'Trustees' tab of a form. At the top, the title 'Trustees' is displayed. Below it, a question asks 'What is the minimum number of trustees in this Document?' with a red asterisk indicating it is mandatory. A text input field contains the number '1'. Below this, there are three sections: 'Added Trustee(s)', 'Updated Trustee(s)', and 'Deleted Trustee(s)'. Each section shows 'No [Action] Trustee(s) in this list' and a corresponding button: 'Add Trustee', 'Update Trustee', and 'Delete Trustee'. At the bottom of the form, there is a 'Save Draft' button with a floppy disk icon. Three callout boxes provide additional information: one points to the red asterisk, another points to an information icon (a lowercase 'i' in a circle) next to the input field, and a third points to the 'Save Draft' button.

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.

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.



The screenshot shows a form titled "Trustee Name". It has two radio buttons for "Type": "Individual" (selected) and "Organisation". Below this is a "Title" field with an "i" icon and an "eye" icon. A callout box points to the "eye" icon with the text: "The 'eye' symbol indicates that the information entered in a particular field will appear on the public Register." Below the "Title" field are three text input fields for "First Name" and "Last Name", each with an "i" icon and an "eye" icon. The form also has a "Trustee Address" section and "Save" and "Cancel" buttons at the bottom.

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.

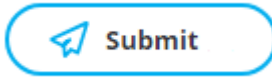
In this tab you can add, update or delete any such connections within your organisation.

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.

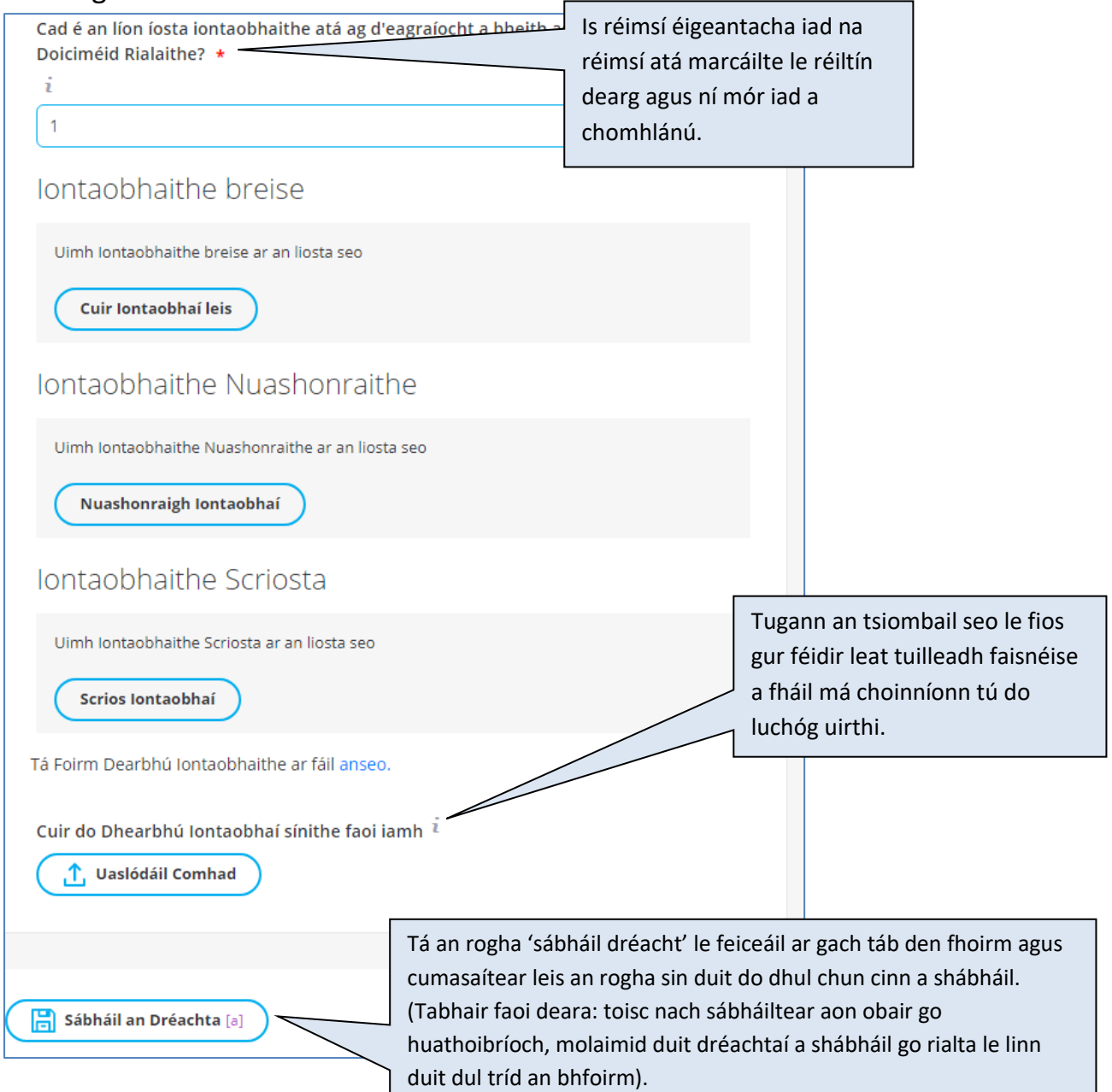
Then click on  to submit your changes to the Charities Regulator. You will receive a notification when it is processed.

English

Iontaobhaithe, Baint agus Comhairleoirí Seachtracha a Chothabháil – Treoir Úsáideora

Bain úsáid as an bhfoirm seo chun iontaobhaithe carthanais a nuashonrú, a scriosadh nó a chur leis nó chun faisnéis a bhaineann le baint agus comhairleoirí seachtracha a nuashonrú.

Tá ceithre tháb le comhlánú san fhoirm seo: Iontaobhaithe, Comhairleoirí, Baint agus Dearbhú.



Cad é an líon íosta iontaobhaithe atá ag d'eagraíocht a bheith Doiciméid Rialaithe? *

1

Iontaobhaithe breise

Uimh Iontaobhaithe breise ar an liosta seo

Cuir Iontaobhaí leis

Iontaobhaithe Nuashonraithe

Uimh Iontaobhaithe Nuashonraithe ar an liosta seo

Nuashonraigh Iontaobhaí

Iontaobhaithe Scriosta

Uimh Iontaobhaithe Scriosta ar an liosta seo

Scrios Iontaobhaí

Tá Foirm Dearbhú Iontaobhaithe ar fáil [anseo](#).

Cuir do Dhearbhú Iontaobhaí sínithe faoi iamh

Uaslódáil Comhad

Sábháil an Dréachta [a]

Is réimsí éigeantacha iad na réimsí atá marcáilte le réiltín dearg agus ní mór iad a chomhlánú.

Tugann an tsiombail seo le fios gur féidir leat tuilleadh faisnéise a fháil má choinníonn tú do luchóg uirthi.

Tá an rogha 'sábháil dréacht' le feiceáil ar gach táb den fhoirm agus cumasaítear leis an rogha sin duit do dhul chun cinn a shábháil. (Tabhair faoi deara: toisc nach sábháiltear aon obair go huathoibríoch, molaimid duit dréachtaí a shábháil go rialta le linn duit dul tríd an bhfoirm).

1. Iontaobhaithe

Sa táb seo, is féidir leat iontaobhaithe carthanais nua a chur leis, sonraí iontaobhaithe reatha a nuashonrú nó iontaobhaithe nach bhfuil an post sin acu a thuilleadh i do charthanas a scriosadh.

Is gnách go leagtar síos i do dhoiciméad rialaithe an líon íosta iontaobhaithe nach mór do do Charthanas a bheith aige. Mura leagtar síos é ann, iontráil an líon íosta iontaobhaithe atá ann i do charthanas faoi láthair.

Chun iontaobhaí nua a chur leis, cliceáil ar ‘Cuir Iontaobhaí Leis’ chun an mhír aníos a oscailt – iontráil na sonraí atá riachtanach agus cliceáil ar ‘sábháil’. Déan é sin arís agus arís eile go dtí go mbeidh na hiontaobhaithe nua uile curtha leis.

Tabhair faoi deara: Chun an ról atá ag iontaobhaí reatha a athrú, e.g. ó rúnaí cuideachta go cathaoirleach, beidh ort an t-iontaobhaí a scriosadh agus é/í a chur leis an athuir. Sa chás seo, éileoidh an córas ort dearbhú a uaslódáil do gach iontaobhaí atáthar ag cur leis. Mar sin féin, ós rud é nach iontaobhaí nua é/í an t-iontaobhaí atáthar ag cur leis agus nach bhfuil ann ach ról nua, ní gá duit dearbhú sínithe a uaslódáil. Ina ionad sin, is féidir leat comhad pdf a uaslódáil, rud nach gá a shíniú, agus ‘níltear ag cur aon iontaobhaí nua leis, níl ann ach athrú sa chaidreamh’ á lua ann.

Éilítear seoladh cónaithe iomlán (Éirchód san áireamh) do gach iontaobhaí.

Is féidir leat an seoladh nó an tÉirchód a iontráil sa bharr ‘Cuardaigh Seoladh’ agus is féidir leat cliceáil ar an toradh ansin chun go líonfar an seoladh isteach go huathoibríoch.

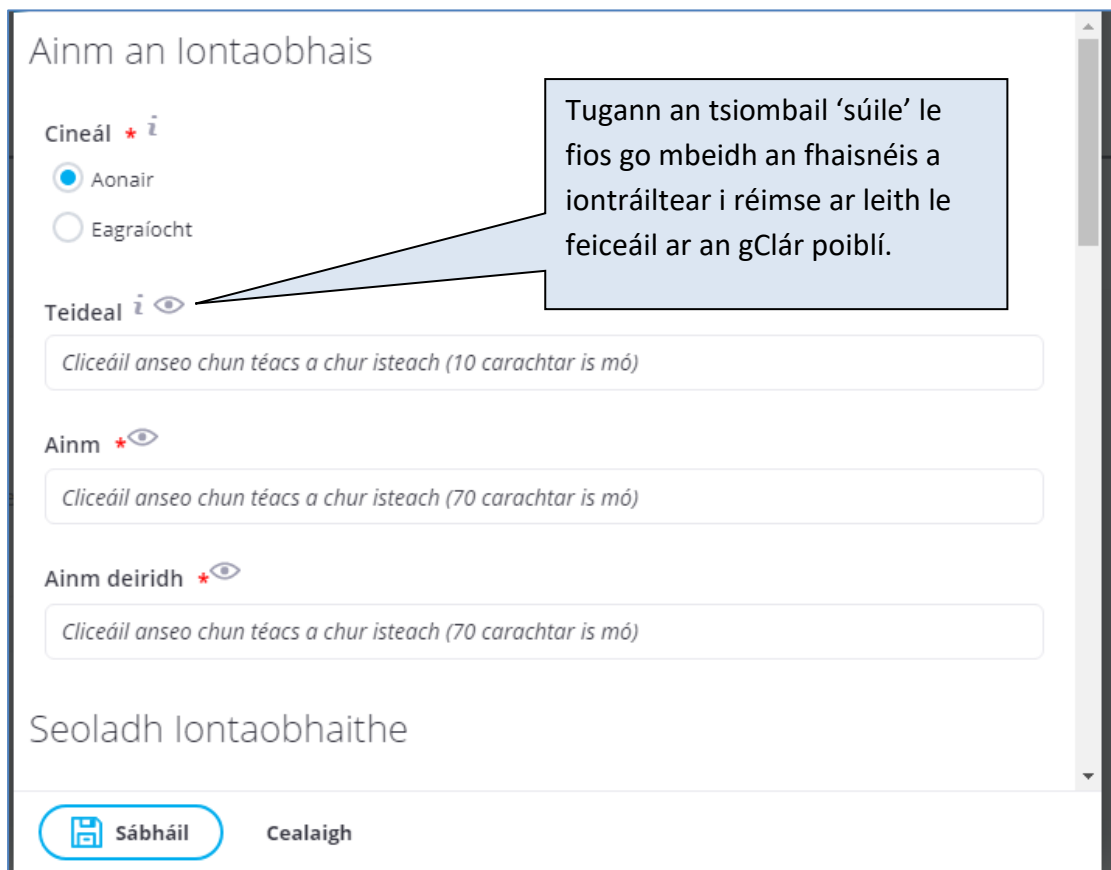
Má tá do sheoladh lonnaithe i limistéar ina bhfuil a lán seoltaí neamhuathúla (amhail baile fearainn tuaithe), beidh ort d’Éirchód a iontráil sa bharr ‘Cuardaigh Seoladh’ nó an seoladh a iontráil de láimh.

Ná déan dearmad ar an Éirchód a iontráil freisin. Mura bhfuil d'Éirchód ar eolas agat, cliceáil ar an Aimsitheoir Éirchód (<https://finder.eircode.ie>) chun cabhrú leat é a aimsiú.

Ní fhoilseofar seoltaí iontaobhaithe ar an gclár poiblí. Is le haghaidh úsáid inmheánach amháin a bhailítear seoltaí.

Déan deimhin de go dtugtar freisin an dáta tosaigh do gach iontaobhaí (an dáta a d'éirigh an duine ina (h)iontaobhaí).

Ní mór an ról mar Chathaoirleach a shannadh d'iontaobhaí amháin. Más cuideachta í d'eagraíocht, ní mór an ról mar Rúnaí Cuideachta a shannadh d'iontaobhaí amháin.




Ainm an iontaobhais


Cineál * *i*

Aonair


Eagraíocht

Teideal *i* 

Cliceáil anseo chun téacs a chur isteach (10 carachtar is mó)


Ainm * 

Cliceáil anseo chun téacs a chur isteach (70 carachtar is mó)

Ainm deiridh * 

Cliceáil anseo chun téacs a chur isteach (70 carachtar is mó)

Seoladh iontaobhaithe

 Sábháil Cealaigh

Tugann an tsiombail 'súile' le fios go mbeidh an fhaisnéis a iontráiltear i réimse ar leith le feiceáil ar an gClár poiblí.

Éilítear seoladh cónaithe iomlán (Éirchód san áireamh) do gach iontaobhaí.

Is féidir leat an seoladh nó an tÉirchód a iontráil sa bharr 'Cuardaigh

Seoladh’ agus is féidir leat cliceáil ar an toradh ansin chun go líonfar an seoladh isteach go huathoibríoch.

Má tá do sheoladh lonnaithe i limistéar ina bhfuil a lán seoltaí neamhuathúla (amhail baile fearainn tuaithe), beidh ort d’Éirchód a iontráil sa bharr ‘Cuardaigh Seoladh’ nó an seoladh a iontráil de láimh. Ná déan dearmad ar an Éirchód a iontráil freisin. Mura bhfuil d’Éirchód ar eolas agat, cliceáil ar an Aimsitheoir Éirchód (<https://finder.eircode.ie>) chun cabhrú leat é a aimsiú.

Ní fhoilseofar seoltaí iontaobhaithe ar an gclár poiblí. Is le haghaidh úsáid inmheánach amháin a bhailítear seoltaí.

Déan deimhin de go dtugtar freisin an dáta tosaigh do gach iontaobhaí (an dáta a d’éirigh an duine ina (h)iontaobhaí).

Ní mór an ról mar Chathaoirleach a shannadh d’iontaobhaí amháin. Más cuideachta í d’eagraíocht, ní mór an ról mar Rúnaí Cuideachta a shannadh d’iontaobhaí amháin.

A luaithe atá na hiontaobhaithe nua uile curtha leis, ní mór duit cóip PDF de Dhearbhú sínithe ó iontaobhaí a uaslódáil do gach iontaobhaí nua – cliceáil ar ‘Uaslódáil Comhad’, roghnaigh an comhad agus uaslódáil é. Má tá níos mó ná iontaobhaí amháin á gcur leis, is féidir na dearbhuithe a scanadh ina gcomhad PDF amháin agus iad a uaslódáil le chéile. Mar mhalairt air sin, is féidir leat gach ceann díobh a uaslódáil mar dhoiciméid ar leith. Maidir le haon doiciméid atá le huaslódáil, ní mór go mbeidh siad i bhformáid PDF agus go mbeidh níos lú ná 5 MB iontu.

Ar mhaithe le soiléire – is é an t-aon uair amháin nach mór d’iontaobhaí dearbhú ó iontaobhaí a chomhlánú agus a shíniú ná an uair atá sé/sí á c(h)ur le clárú an charthanas den chéad uair riamh i.e. nuair atá sé/sí ina (h)iontaobhaí nua ar fad. Má tá tú ag athrú an róil atá ag iontaobhaí, ní gá duit dearbhú sínithe a uaslódáil. Ina ionad sin, is féidir leat comhad pdf a uaslódáil, rud nach gá a shíniú, agus ‘nílítear ag cur aon iontaobhaí nua leis, níl ann ach athrú sa chaidreamh’ á lua ann.

Scoileanna – Bord Bainistíochta

Má tá d’eagraíocht ina scoil a bhfuil uimhir rolla aici, is iad na comhaltaí den Bhord Bainistíochta na hiontaobhaithe carthanas. Ní gá do chomhaltaí den Bhord Bainistíochta Dearbhú ó Iontaobhaí a chomhlánú agus a uaslódáil.

Chun iontaobhaí reatha a nuashonrú, cliceáil ar ‘Nuashonraigh Iontaobhaí’ chun an mhír aníos a oscailt – roghnaigh an t-iontaobhaí ón liosta anuas, iontráil na sonraí atá riachtanach agus cliceáil ar ‘sábháil’.

Chun iontaobhaí reatha a bhaint, cliceáil ar ‘Scríos Iontaobhaí’ chun an mhír aníos a oscailt – roghnaigh an t-iontaobhaí ón liosta anuas, iontráil na sonraí atá riachtanach agus cliceáil ar ‘sábháil’.

2. Comhairleoirí

Is féidir leat aon chomhairleoirí atá ag d’eagraíocht a chur leis, a nuashonrú nó a scríosadh sa réimse seo. Is féidir go n-áireofaí leo sin aturnaetha, cuntasóirí, iniúchóirí nó comhairleoirí airgeadais eile.

Cliceáil ar an rogha ábhartha chun an mhír aníos a oscailt – iontráil na sonraí atá riachtanach agus cliceáil ar ‘sábháil’.

3. Baint

Iarrtar ort freisin breac-chuntas a thabhairt ar aon bhaint (lena n-áirítear aon chaidreamh teaghlaigh, gnó agus fostaíochta) atá ann idir iontaobhaithe nó bunaitheoir d’eagraíochta agus aon duine de d’fhostaithe nó de do sholáthraithe earraí nó seirbhísí.

Sa táb seo, is féidir leat aon bhaint den sórt sin atá ann laistigh de d’eagraíocht a chur leis, a nuashonrú nó a scríosadh.

Má tá baint nua á cur leis, beidh ort a shonrú cén caidreamh atá ag an duine/ag an eagraíocht le do charthanas, cad iad na dualgais atá ar an duine/ar an eagraíocht de réir an chonartha, agus cá mhéad a íoctar leis

an duine/leis an eagraíocht. Ceanglófar ort freisin cóip a thabhairt de mhiontuairiscí an chruinnithe boird inar ceadaíodh an caidreamh sin.

4. Dearbhú

Sa rannán seo, is féidir leat an fhaisnéis atá tugtha agat a athbhreithniú agus a dheimhniú. Más deimhin leat go bhfuil an fhaisnéis ceart, agus má cheadaigh na hiontaobhaithe í lena cur isteach, ba cheart duit d'athruithe a chur isteach. Ba cheart na téarmaí príobháideachais agus an Ráiteas faoi Chleachtais Faisnéise a léamh agus ba cheart glacadh leo.

A luaithe atá tú sásta leis sin, is féidir leat cliceáil ar [Réamhamharc](#) chun d'fhaisnéis a íoslódáil i bhformáid PDF.

Cliceáil ar [Cuir isteach \[s\]](#) ansin chun d'iarratas a chur faoi bhráid an Rialálaí Carthanas. Gheobhaidh tú fógra nuair a bheidh an fhoirm próiseáilte.