

## Applications pursuant to the Charities Acts 1961 and 1973 (as amended)

# User Guide – Charitable Bequest (PAS3)

To submit an application, you must have a user account and be logged into ‘MyAccount’ (please see the Technical User Guide available on our website for more information about MyAccount). Once you are logged in, scroll to the end of the screen and click on the button titled ‘Charity Services’. Then click on the button titled ‘Charitable Bequest’.

There are four sections to be completed in this form, in addition to the details of the filer in the Introduction section:

- (1) Details
- (2) Personal Representatives
- (3) Bequest Details
- (4) Declaration

### **IMPORTANT NOTE BEFORE YOU START:**

The text which you enter in this form will create the Charitable Bequest Form for lodging in the Probate Office with the Application for Grant. Please therefore ensure that it is accurate, coherent and contains sufficient detail for the purposes of the application.

Throughout the form you will see icons at some of the questions – the sample screenshot below, taken from one of our forms, explains what these icons mean:

The screenshot shows a web form titled "New Trustees". At the top, it says "No New Trustees in this list". Below that is a section "Add New Trustees". The first field is "Type", which is marked with a red asterisk and an information icon (i). There are two radio button options: "Individual" and "Organisation". Below this is a red bar labeled "Required". There are two buttons: "Save" and "Cancel". The next field is "Location where Statutory Notice will be displayed", also marked with a red asterisk and an information icon. The text "Place in a public area" is visible in the input field. At the bottom left, there is a "Save Draft (a)" button. Three callout boxes provide additional information: one points to the red asterisk, one points to the information icon, and one points to the "Save Draft" button.

New Trustees

No New Trustees in this list

Add New Trustees

Type \* i

Individual

Organisation

Required

Save Cancel

Location where Statutory Notice will be displayed \* i

Place in a public area

Save Draft (a)

Any field marked with a red asterisk is mandatory.

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

The 'Save Draft' option appears at the end of each section of the form and allows you to save your progress. (Note: there is no automatic save so we recommend that you save draft regularly as you work through the form).

The details of the filer (i.e. the firm, company or person submitting the application) must be entered in the Introduction section.

You can enter the address or Eircode in the Search Address bar and then click the result to autofill the address. If there are a number of organisations operating from the same address you will need to click on the appropriate firm or company name from the list returned for that address. Alternatively, you can enter the full address manually.

Once the filer details are entered, you can then proceed to complete the remainder of the application form.

## 1. Details

In this tab you are required to enter the name of each beneficiary (charity) detailed in the Will.

Firstly add the details of the beneficiary and save (If the beneficiary is a registered charity, there is a search option – simply start to type the name of the charity or the registered charity number and the system will return a list of results for you to select from, click on the relevant one to populate the data into the field.

Repeat this process until you have added all relevant beneficiaries.

You must then then add the details of the deceased. Regarding the address, 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 the Eircode into the Search Address bar, or else enter the address manually.

Finally, enter the date of death and the date of the Will.

## 2. Personal Representatives

In this tab you must enter details of the Personal Representative(s) dealing with the Estate of the deceased.

Enter the details of each Personal Representative,

Regarding the address, 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 the Eircode into the Search Address bar, or else enter the address manually.

Once you have entered all the details of the Personal Representative, click on 'save'.

Repeat this process until you have added all relevant Personal Representatives.

## 3. Bequest Details

In this tab you must enter details of the Bequest(s).

Firstly select the type of bequest from the drop down list and complete any additional questions e.g. such as the monetary value of the legacy. Then enter the exact wording of the bequest as it appears in the Will.

Once you have entered all the details, click on 'save'.

If there is more than one charitable bequest in the Will, repeat this process until you have added all of them.

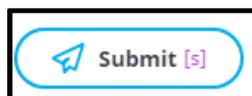
Please ensure to check that the details of the charitable bequest(s) are consistent with the Will and the beneficiary details you entered in the details tab.

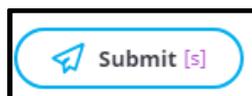
#### 4. Declaration

This section provides a review of the application. At this point it is recommended that you preview the **Application Form** which will be generated prior to taking any further steps.



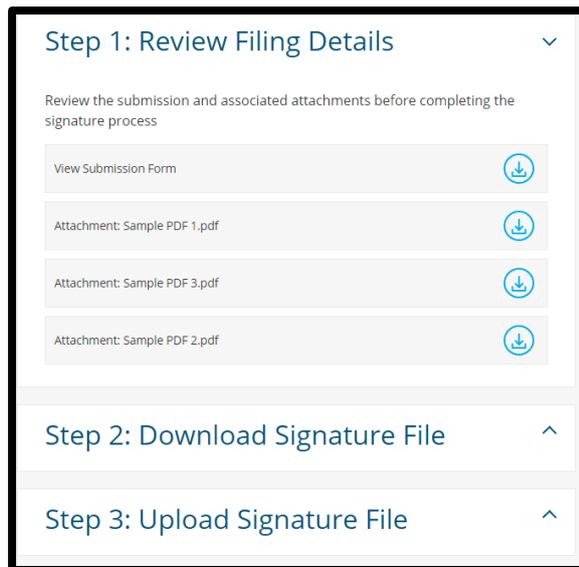
Click on  to open it as a PDF, review the content and satisfy yourself that it is accurate, coherent and contains sufficient details. Do not edit the PDF. If you wish to make any amendments, return to the form, amend as required by working through the sections (tabs) and then preview it again.



Once you are satisfied, click  to finalise the initial application.

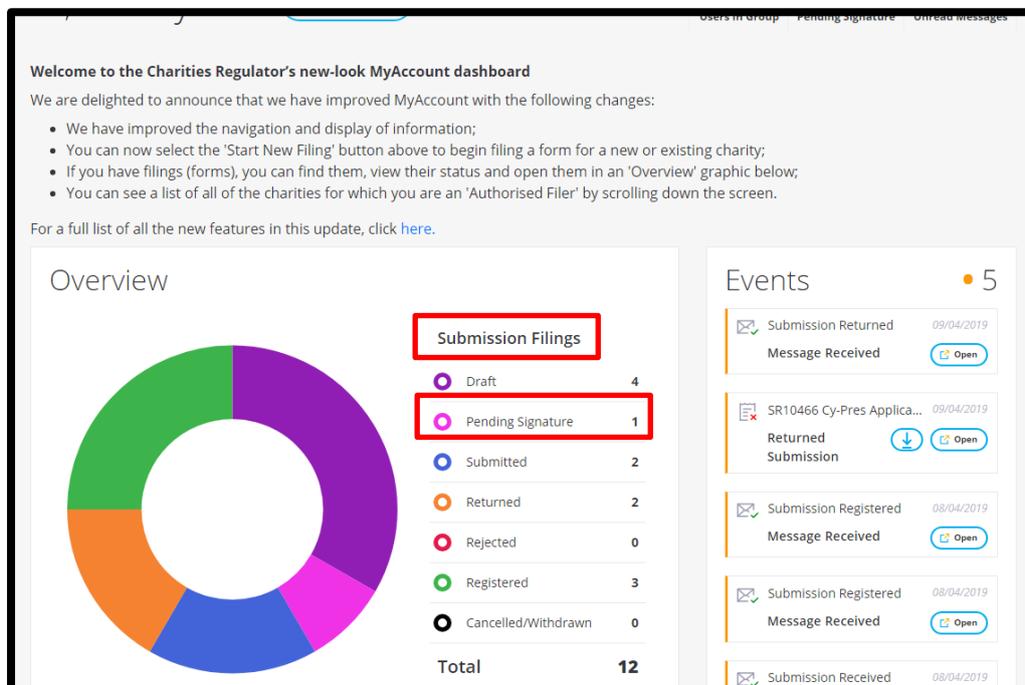
**Please note: once you click on the 'Submit' button you cannot edit your application further.**

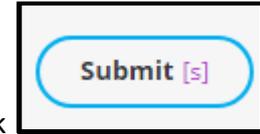
Once submitted, click on the button titled 'Proceed to Signature page' to proceed to the next step.

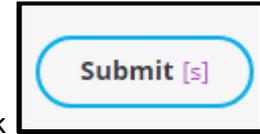


Download the Signature File (this is the Application Form), print it then have it signed as appropriate. Scan it to a single PDF file and, once you are ready to upload it, click on 'Upload Signature File' to upload the signed version. (If there are multiple signed documents, these must be scanned into a single PDF for upload).

If you are not in a position to complete the upload immediately, you can access the upload option at a later stage via your dashboard, by selecting '**Pending Signature**' under the '**Submission Filings**' heading, see screen shot below.





Once you have uploaded the PDF of the **signed document(s)**, click  to submit the online application to the Charities Regulator.

Please ensure to **lodge the original** signed Signature File (i.e. Application Form), together with the application for a grant with the **Probate Office**. Please **do not** send any documents directly to the Charities Regulator.