



**MBS Charitable
Foundation**

SUPPORTING OUR LOCAL COMMUNITY

Learn about the foundation,
funding eligibility and how
to donate today.



**Melton
Building
Society**



About Melton Mowbray Building Society Charitable Foundation

Melton Mowbray Building Society Charitable Foundation was launched on 26 March 1998 to promote and support local charitable and community activity. The establishment of the Foundation was an initiative of Melton Building Society which, since its own inception in 1875, has been committed to maintaining the value of caring for its members' needs.

The Foundation is a registered charity (registration number 1067348). It is controlled by an advisory committee of trustees who meet quarterly in March, June, September, December and it holds a trust fund providing a capital base for donations made.

Melton Building Society is committed to making an annual contribution to the Foundation's trust fund. At the same time, it will meet in full any administration costs that arise, thus ensuring that the trust funds are used entirely for the benefit of our local community.

How can the Foundation help our local community?

The principal objective of the Foundation is to direct its resources towards those less advantaged individuals or organisations

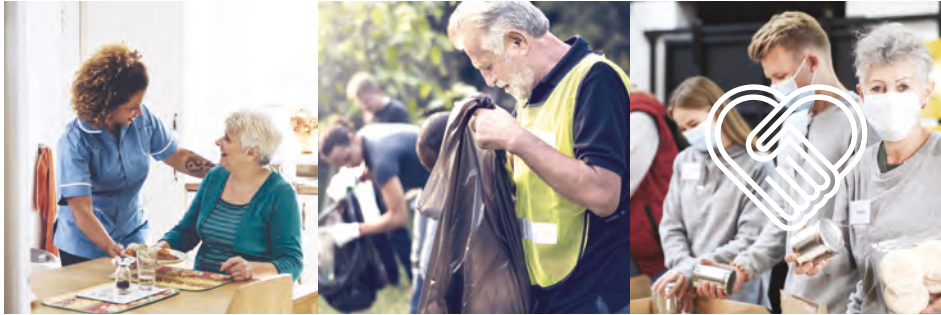
within a local catchment area of a 15 mile radius of the Building Society's branch offices in Melton Mowbray, Grantham, Oakham, Bourne and Stamford.

The Foundation divides its resources between two areas of activity:

1. Community Projects

The Foundation aspires to give at least 33% and up to 50% of the annual contribution made by Melton Building Society to either kickstart a community project within the catchment area or to establish an enduring activity or initiative for the benefit of the community. The extent of the contribution will be decided by the trustees based on the merits of individual projects.

Do you want to support the foundation? Speak to us today about making a donation.



Suggestions for such a project are welcomed from the local community. It is appreciated that any project selected could take more than a year's commitment from the Foundation.

2. Community Activities

The Foundation utilises the remaining funds contributed by Melton Building Society in any one year to support a variety of local worthwhile needs.

The types of request considered by the Foundation will be from:

Young people, particularly those who are disadvantaged

Vulnerable groups such as the frail elderly, people with physical disability, people with learning difficulties or those who are mentally ill

Organisations where health and well-being programmes are being promoted and delivered

Small neighbourhood groups in areas experiencing the greatest disadvantage

Communities and voluntary organisations seeking assistance in the achievement of social and community development

Organisations supporting improvement in Financial literacy across all ages

The Foundation is unlikely to make donations towards:

Running costs including rent or staff wages

Expeditions or overseas travel

Entities or individuals who have applied to the Foundation within the previous 12 months

The restoration or upgrading of buildings, including churches

Sponsorship of individuals

National Charities or fund requests which do not have direct relevance to our local community

How to apply to Melton Mowbray Building Society Charitable Foundation

Individuals or organisations within the Foundation catchment area are eligible to apply for charitable support from the Foundation.

The Foundation trustees have the sole power to accept or decline any applications received. In the interests of fairness, if you are successful in making an application to the Foundation, you will be unable to apply for further assistance within the following 12 months from the date of grant.

If you think you are eligible to apply, please write stating the following:

- 1. Reason for the request**
- 2. Who will benefit from the charitable donation**
- 3. When the funds are required**

In some circumstances it will be helpful to the trustees to state how the money will be spent. Trustees will normally only consider granting amounts between £50 and £500.

Please write to:

The Secretary to the Trustees
Melton Building Society Charitable Foundation

Mutual House , Leicester Road, Melton Mowbray
Leicestershire, LE13 0DB

or email c.ritchie@mmbs.co.uk
or visit www.themelton.co.uk for further information

Do you want to support the foundation? Speak to us today about making a donation.

Thank you for your support in helping us

SUPPORT OUR LOCAL COMMUNITY



How you can help us

If you wish to help the Foundation to support the local community either by making a donation or by arranging fundraising or support for our chosen community project, the Foundation trustees will be extremely grateful.

To discuss any support for our chosen Community Project, please contact us on **01664 414141**.

Any donation you make will also be matched by Melton Building Society.*

*Subject to a max level at the discretion of the Society's Board of Directors.



Gift Aid Declaration

Name of Charity:

**Melton Mowbray Building Society
Charitable Foundation**

Details of donor:

Title: Forename(s):

Surname:

Address:

Postcode:

You must pay an amount of Income Tax and/or Capital Gains Tax at least equal to the tax that the charity reclaims on your donations in the appropriate tax year (currently 25p for each £1 you give).

Date: / /

Notes:

- 1 You can cancel this Declaration at any time by notifying the charity.
- 2 If in the future your circumstances change and you no longer pay tax on your income and capital gains equal to the tax that the charity reclaims, you can cancel your declaration.
- 3 If you pay tax at the higher rate you can claim further tax relief in your Self Assessment tax return.
- 4 If you are unsure whether your donations qualify for Gift Aid tax relief, ask the charity or, refer to the HMRC web site: www.hmrc.gov.uk
- 5 Please notify the charity if you change your name or address

I want the charity to treat

*the enclosed donation of £
as a Gift Aid donation

the donation(s) of £
which I made on / /
as (a) Gift Aid donation(s)

*all donations that I make from the date of this declaration until I notify you otherwise as Gift Aid donations

*all donations I have made for the six years prior to this year, (but no earlier than 6/4/2000) and all donations I make from the date of this declaration until I notify you otherwise, as Gift Aid donations.

*delete as appropriate

Do you want to support the foundation? Speak to us today about making a donation.

Supporting our local community

Summary Privacy Notice – YOUR PERSONAL INFORMATION AND WHAT WE DO WITH IT

Melton Mowbray Building Society Charitable Foundation takes your privacy very seriously and always treats your personal details with the utmost care. We promise to keep your information safe and secure.

This summary provides information on:

How we process your personal information;

The legal grounds for our processing of your personal information;

Who we share your information with; and

Your rights under Data Protection Laws.

Why do we process your personal information?

This will depend on the nature of any request you make to the Trustees but can include (but is not restricted to):

To manage our relationship with you and provide charitable support;

To communicate information about your request;

To administer the Foundation's finances including any request for funding;

For internal operational requirements, including meeting Regulatory obligations; and

For audit purposes.

What are the legal grounds for our processing of your personal information?

Data protection laws require us to explain what legal grounds justify our processing of your personal information (this includes sharing it with other organisations). For some processing more than one legal ground may be relevant (except where we rely on a consent). Here are the legal grounds that are relevant to us:

- 1 Processing necessary to perform our charitable objectives, including providing financial support to claimants;
- 2 Where we consider that, on balance it is appropriate for us to do so and the processing is necessary as a result of the legitimate interest which apply to us and in some cases other organisations;

3 Processing necessary to comply with our legal obligations;

4 Processing with your consent; and

5 Processing for a substantial public interest under laws that apply to us where this helps us to meet our broader social obligations.

What are your rights under data protection laws?

Here is a list of the rights that all individuals have under data protection laws. They do not apply in all circumstances, however, if you wish to exercise any of them we will explain at that time if they are engaged or not:

The right to be informed about processing of your personal information;

The right to have your personal information corrected if it is inaccurate and to have incomplete personal information completed;

The right to object to processing of your personal information;

The right to restrict processing of your personal information;

The right to have your personal information erased (the "right to be forgotten");

The right to request access to your personal information and to obtain information about how we process it.

You have the right to complain to the Information Commissioner's Office which enforces data protection laws:
www.ico.org.uk.

You can contact our Data Protection Officer or request the leaflet "Your Data Protection Rights" by visiting a branch, calling us on **01664 414141** or via **www.themelton.co.uk/gdpr** for more details on all the above.



**MBS Charitable
Foundation**

Main Office

Mutual House, Leicester Road,
Melton Mowbray, Leics., LE13 0DB.

T. 01664 414141

F. 01664 414040

E. melton@mmbs.co.uk

Branch Offices

18 Nottingham Street,
Melton Mowbray, Leics.,
LE13 1NW.

T. 01664 480214

F. 01664 560321

E. meltonbranch@mmbs.co.uk

48 High Street, Grantham,
Lincs., NG31 6NE.

T. 01476 564528

F. 01476 575231

E. grantham@mmbs.co.uk

23 High Street, Oakham,
Rutland, LE15 6AH.

T. 01572 757911

F. 01572 757946

E. oakham@mmbs.co.uk

1 North Street, Bourne,
Lincs., PE10 9AE.

T: 01778301556

E: bourne@mmbs.co.uk

49 High Street, Stamford,
Lincs., PE9 2BD.

T: 01780431061

E: stamford@mmbs.co.uk

themelton.co.uk

Melton Mowbray Building Society, Mutual House,
Leicester Road, Melton Mowbray, Leicestershire, LE13 0DB
The Charitable Foundation is a registered charity, registration number 1067348.



**Melton
Building
Society**