

## **APPENDIX 3**

# **SUMMARY OF CHARITY REORGANISATION BY NEW CHARITABLE TRUST**

**Charitable Purposes of the Trust:**

- a Prevention or relief of poverty
- b Relief of those in need by reason of age, ill-health, Disability, financial hardship or other
- c Advancement of Health, including the advancement of education in health

Current Charity Reg. Number	Fund Name	Area Forum	Area Restriction	Charitable Trust purpose Restriction	Capital Balance	Revenue Balance	Revised Balances with Proposal max 5%	
					as at 31 March 2014	as at 31 March 2014	Capital	Revenue
					£	£	£	£
SC017675	A Black Bequest	Berwickshire	Mid & East Berwickshire	a & b	2,353.42	2,275.23		
SC017676	G Collin Bequest	Berwickshire	Mid & East Berwickshire	a & b	125.00	566.74		
SC017677	Duns Parish Coal Fund	Berwickshire	Mid & East Berwickshire	a & b	453.78	2,889.18		
SC017678	T Fair Bequest	Berwickshire	Mid & East Berwickshire	a & b	1,466.15	3,233.11		
SC017679	Lord Majoribanks Bequest	Berwickshire	Mid & East Berwickshire	a & b	397.01	2,227.22		
SC017680	D MacWatt Bequest	Berwickshire	Mid & East Berwickshire	a & b	5,850.29	20,293.94		
SC017681	Robertson Bequest	Berwickshire	Mid & East Berwickshire	a & b	100.00	46.96		
SC018703	R Hamilton Bequest	Berwickshire	Mid & East Berwickshire	a & b	113.53	1,791.14		
SC017683	W R Watson Bequest (10% of Fund)	Berwickshire	Berwickshire	a & b	521.68	3,019.79		
SC018704	A Cameron Bequest	Berwickshire	Mid & East Berwickshire	a & b	2,000.00	2,042.81		
<b>Total Berwickshire Area</b>					<b>13,380.86</b>	<b>38,386.12</b>	<b>49,178.98</b>	<b>2,588.00</b>
SC019158	I Hymers-Forrester Bequest	Eildon	Galashiels & District	a & b	477.88	873.77		
SC019161	Murray Coal Fund	Eildon	Galashiels & District	a & b	895.68	1,866.91		
<b>Sub-Total Galashiels &amp; District</b>					<b>1,373.56</b>	<b>2,740.68</b>	<b>3,908.24</b>	<b>206.00</b>
SC019157	Miss H Gibson Trust	Eildon	Leaderdale & Melrose	a & b	1,583.96	1,236.05		
SC019160	Melrose Burgh Benevolent Trust	Eildon	Leaderdale & Melrose	a & b	1,358.38	1,156.86		
SC019164	T Welsh bequest	Eildon	Leaderdale & Melrose	a & b	168.63	270.97		
SC019587	Sibbald Bequest	Eildon	Leaderdale & Melrose	a & b	335.26	1,656.69		
<b>Sub-Total Leaderdale &amp; Melrose</b>					<b>3,446.23</b>	<b>4,320.57</b>	<b>7,378.80</b>	<b>388.00</b>
<b>Total Eildon Area</b>					<b>4,819.79</b>	<b>7,061.25</b>	<b>11,287.04</b>	<b>594.00</b>
SC019590	J H Halliburton Bequest	Cheviot	Jedburgh & District	a & b	425.36	0.00		
SC019591	K Veitch Memorial Fund	Cheviot	Jedburgh & District	a & b	5,539.41	12,287.41		
<b>Total Cheviot Area</b>					<b>5,964.77</b>	<b>12,287.41</b>	<b>17,339.18</b>	<b>913.00</b>
SC019584	Lt J B Innes Memorial Fund	Teviot & Liddesdale	Hawick & Denholm/ Hawick & Hermitage	a & b	1,000.00	3,463.43		
SC019586	Denholm Bairns Trust	Teviot & Liddesdale	Hawick & Denholm/ Hawick & Hermitage	a & b	500.00	2,468.60		
<b>Total Teviot &amp; Liddesdale Area</b>					<b>1,500.00</b>	<b>5,932.03</b>	<b>7,060.03</b>	<b>372.00</b>
SC018718	Miss Erskine's Mortification	Tweeddale	Tweeddale East & West	None	320.07	338.62		
<b>Sub-Total Total General Charitable Purposes</b>					<b>320.07</b>	<b>338.62</b>	<b>625.69</b>	<b>33.00</b>
SC018717	McCall and Veitch Bequest	Tweeddale	Tweeddale East & West	a & b	647.35	148.55		
SC018719	J Hope Benevolent Fund	Tweeddale	Tweeddale East & West	a & b	1,000.00	636.54		
SC018722	M Allan Bequest	Tweeddale	Tweeddale East & West	a & b	2,100.00	1,880.54		
<b>Sub-Total Total Specified Charitable Purposes a) &amp; b)</b>					<b>3,747.35</b>	<b>2,665.63</b>	<b>6,091.98</b>	<b>321.00</b>
<b>Total Tweeddale Area</b>					<b>4,067.42</b>	<b>3,004.25</b>	<b>6,717.67</b>	<b>354.00</b>
<b>Total Reallocated to new SBC Welfare Trust Fund</b>					<b>29,732.84</b>	<b>66,671.06</b>	<b>91,582.90</b>	<b>4,821.00</b>

**Charitable Purposes of the Trust:**

- a Advancement of community development
- b Advancement of the arts, heritage, culture or science, including the upkeep of heritage
- c Advancement of recreational facilities, or the organisation of recreational activities, with the object of improving condition of life for the persons for whom the facilities or activities are primarily intended
- d Advancement of environmental protection or improvement.

Current Charity Reg. Number	Fund Name	Area Forum	Area Restriction	Charitable Trust purpose Restriction	Capital Balance	Revenue Balance	Revised Balances with Proposal max 5%	
					as at 31 March 2014		Capital	Revenue
					£	£	£	£
SC019159	Ladhope Burial Ground Fund		None	b	933.39	0.00		
SC018720	Miss J M Aitken Bequest		None	b	133.38	242.09		
SC017674	W Bell ( Peelwalls )		None	b	20.00	2.44		
<b>Total Borders Wide</b>					<b>1,086.77</b>	<b>244.53</b>	<b>1,264.30</b>	<b>67.00</b>
SC017682	Swinton Village Trust	Berwickshire	Berwickshire	None	1,394.20	10,505.72		
<b>Sub-Total General Charitable Purposes</b>					<b>1,394.20</b>	<b>10,505.72</b>	<b>11,304.92</b>	<b>595.00</b>
SC017683	W R Watson Bequest (90% of Fund)	Berwickshire	Berwickshire	b	4,695.10	27,178.14		
<b>Sub-Total Specific to Charitable Purposes b)</b>					<b>4,695.10</b>	<b>27,178.14</b>	<b>30,279.24</b>	<b>1,594.00</b>
SC019163	Henderson Endowment	Berwickshire	Henderson Park and War Memorial, Gordon	Specific to location	284.19	183.69		
<b>Sub-Total Specific to Charitable Purposes relating to Park &amp; War Memorial</b>					<b>284.19</b>	<b>183.69</b>	<b>444.88</b>	<b>23.00</b>
<b>Total Berwickshire Area</b>					<b>6,373.49</b>	<b>37,867.55</b>	<b>42,029.04</b>	<b>2,212.00</b>
SC019589	Allerley Well Park Trust	Cheviot	Allerley Well Park, Jedburgh	Specific to location	1,440.00	0.00		
<b>Total Cheviot Area</b>					<b>1,440.00</b>	<b>0.00</b>	<b>1,440.00</b>	<b>0.00</b>
SC019156	W Dick Trust	Eildon	Selkirkshire	None	501.30	504.56		
<b>Total Eildon Area</b>					<b>501.30</b>	<b>504.56</b>	<b>955.86</b>	<b>50.00</b>
SC019585	Hawick War Memorial Fund	Teviot & Liddesdale	Hawick & Denholm/ Hawick	b	1,014.45	16,314.52		
<b>Sub-Total Specific to Charitable Purposes b)</b>					<b>1,014.45</b>	<b>16,314.52</b>	<b>16,462.97</b>	<b>866.00</b>
SC019588	J Hunter Scott(Mrs J D Smith)	Teviot & Liddesdale	Hawick & Denholm/ Hawick	b & d	0.00	6,275.08		
<b>Sub-Total Specific to Charitable Purposes b) and d)</b>					<b>0.00</b>	<b>6,275.08</b>	<b>5,961.08</b>	<b>314.00</b>
<b>Total Teviot &amp; Liddesdale Area</b>					<b>1,014.45</b>	<b>22,589.60</b>	<b>22,424.05</b>	<b>1,180.00</b>
<b>Total Reallocated to new SBC Community Enhancement Trust Fund</b>					<b>10,416.01</b>	<b>61,206.24</b>	<b>68,113.25</b>	<b>3,509.00</b>

Charitable Purposes of the Trust:  
 a Advance Education  
 b Promote Cultural Exchange

Current Charity Reg. Number	Fund Name	Area Forum	Area Restriction	Charitable Trust purpose Restriction	Capital	Revenue	Revised Balances with	
					Balance as at 31 March 2014 £	Balance 2014 £	Proposal Capital £	max 5% Revenue £
SC020932	I Thom Prize Fund		None	a	823.86	765.53		
<b>Total Borders Wide</b>					<b>823.86</b>	<b>765.53</b>	<b>1,510.39</b>	<b>79.00</b>
<b>Total Reallocated to new SBC Education Trust Fund</b>					<b>823.86</b>	<b>765.53</b>	<b>1,510.39</b>	<b>79.00</b>