

David & Sarah Donaldson Trust Fund - guidelines

1. David & Sarah Donaldson Trust is administered by the Board of Investment and Finance.
2. The trust is for the benefit of Ministers of Religion and or his wife or widow who shall be in needy circumstances
3. Enquiry as to possible access to the Trust funds is open to:
 - any minister (whether retired or serving) or their wives or widows,
OR;
 - presbyteries, committees or individuals within the PCV on behalf of any minister, his wife or widow whom it is thought to be eligible according to the Trust's terms,
4. All enquiries and any ensuing discussions will be held in strictest confidence.
5. Enquiries should be made to the General Manager of the PCV who will in the first instance advise what further actions or information may be appropriate. Enquiries may be made verbally or confidentially in writing. The General Manager will forward requests for assistance to the Board of Investment and Finance for consideration.
6. In considering requests the Board of Investment and Finance takes into account all the relevant circumstances in order to determine whether the situation can be considered as meeting the provision of the trust, specifically whether it constitutes "needy circumstances". In normal situations, it is considered within a minister's ability to meet most regular expenditures from his remuneration if he is full time, given he exerts reasonable care in his budgeting and expenditure. Therefore, a request may not be entertained if it transpires a history of fiscal carelessness was the primary cause of the "needy circumstances". Nevertheless, enquiries will always be reviewed in a spirit of flexibility and sensitivity as befits the intent of the Trust.
7. The Board of Investment and Finance, undertakes to be as generous as the terms of the Trust allow. Examples of situations where funds may be applied include such needs as funeral costs, unexpected loss of employment, significant medical expenses, matters arising from family emergencies, etc.
8. Those who may be in need are encouraged to make enquiries as soon as the need is first discerned. Inquiries and requests need not be delayed until a minister, his wife or widow finds themselves in financially deprived or impoverished circumstances.