

AIA TRUST FUND

APPLICATION FOR EDUCATIONAL SUPPORT OR BENEVOLENT ASSISTANCE

Name _____

Address _____

Postcode _____

Telephone _____ Date of birth _____

Email address _____

Marital Status _____ Occupation _____

The AIA Trust Fund has two distinct objects, please select which object best suits your requirements:

Educational Please ✓

Benevolent Please ✓

The advancement of public education in accountancy and related commercial subjects.

The relief in cases of need, hardship or distress of persons who are fellows, members or registered students of the AIA and their wives, widows, children and other dependants.

Name of Member or former Member

(State N/A if you are not a Member, or former Member, or dependant of a Member, and leave membership details blank below)

AIA Membership number

Membership period

From

To

Please provide details relating to the cost of assistance you require in £ and provide a brief description of what the assistance will be used for.

£

Description:



AIA
THE ASSOCIATION
OF INTERNATIONAL
ACCOUNTANTS

TRUST FUND APPLICATION

Estimated Expenditure (for the next 12 months)

Applicant's Details

Spouse/partner's details

	£ sterling	Local Currency	£ sterling	Local Currency
Regular Household payments				
Mortgage repayment	_____	_____	_____	_____
Rent	_____	_____	_____	_____
Insurance	_____	_____	_____	_____
Service charge	_____	_____	_____	_____
Rates or local taxes	_____	_____	_____	_____
Water rates	_____	_____	_____	_____
Heating and lighting	_____	_____	_____	_____
Television licence/Satellite/Cable fees	_____	_____	_____	_____
Rented household appliances	_____	_____	_____	_____
Telephones (Landline and mobiles)	_____	_____	_____	_____
Household fuel	_____	_____	_____	_____
General payments				
Medical	_____	_____	_____	_____
Clothing	_____	_____	_____	_____
Papers and magazines	_____	_____	_____	_____
Life assurance and Pensions	_____	_____	_____	_____
Car (tax, insurance, fuel, maintenance)	_____	_____	_____	_____
Hire purchase (give details)	_____	_____	_____	_____
Loan repayments (give details)	_____	_____	_____	_____
Credit/store card payments	_____	_____	_____	_____
Travel expenses (give details)	_____	_____	_____	_____
Any other regular expenses (give details)	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
One-off payments				
Holidays	_____	_____	_____	_____
Repairs	_____	_____	_____	_____
General large purchases (give details)	_____	_____	_____	_____
Any other one-off expenses (give details)	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
Total Estimated Expenditure	=====	=====	=====	=====

Estimated Income (for the next 12 months)

Applicant's Details

Spouse/partner's details

£
sterling

Local
Currency

£
sterling

Local
Currency

Regular Income

Employed person's earnings

Self employed person's earnings

State pension

Occupational pension

Income from property (after expenses)

Income from lodgers/borders

Regular payments from relatives

Dividends/interest from investments/savings

Unemployment benefit

Sickness benefit

Child benefit

Housing benefit

Attendance allowance

Mobility allowance

Other state benefit (give details)

Other charities' grants (give details)

Any other regular income (give details)

Any one off grant, gifts etc (give details)

Total Estimated Income

=====

Assets and Liabilities

Value of property

Value of stocks and shares owned

Balance in bank and savings accounts

Other assets (give details)

Amount of mortgage and term outstanding
(give details)

Amount of outstanding loans

Amount of outstanding credit cards

Amount of outstanding hire purchase

Other liabilities (give details)

Total Assets less Liabilities

=====

Have you applied for or received assistance from any other society or person? If so, please give particulars.

Have you taken advice from Counsellors or other Professional advisors to ensure you have claimed all state benefits you are entitled to? If so, please provide details.

Give the name, full address, email address and telephone number of a Member of the AIA or other Professional Accountant, barrister, solicitor, doctor, clergyman, or other persons, to whom reference can be made. Two names should be given and the persons referred to should be fully acquainted with your circumstances. These persons may be contacted, prior to a Trustees meeting, for a character reference.

Name _____ **Occupation** _____

Address _____

_____ **Postcode** _____

Relationship to applicant _____

Name _____ **Occupation** _____

Address _____

_____ **Postcode** _____

Relationship to applicant _____

TRUST FUND APPLICATION

Please list any documents you have provided with your application

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

DECLARATION

I declare that the foregoing statements made by me are correct to the best of my knowledge and I undertake to inform the Association of International Accountants Educational and Benevolent Fund immediately of any changes in my circumstances. I authorise the Association of International Accountants Educational and Benevolent Fund and anyone properly instructed on its behalf to make any enquiries deemed necessary by it in support of my application. I consent to the disclosure of any information provided by me to other charities and/or parties who may be contacted in the course of such enquiries. I understand that this process may include enquiries of, and disclosure of, information to any relevant medical expert or doctor, my general practitioner, any referee indicated on this form and any individual or body that can verify the information provided by me in this form. I consent to this.

I understand that this information will be retained and processed for the purpose of this and future applications made to the Association of International Accountants Educational and Benevolent Fund. I consent to this.

Signature of applicant _____ Date _____

Did the applicant complete the form (please ✓) Yes _____ No _____

If the answer to the above is No, please provide the name, full address, e-mail address and telephone number below and state the relationship to the applicant.

Further information on the AIA Trust Fund is available at www.aiaworldwide.com/AIAEducationalAndBenevolentTrust

Registered with the Charity Commission 1118333

Please return the form to AIA Trust Fund, Association of International Accountants, Staithes 3, The Watermark, Metro Riverside, Newcastle Upon Tyne, NE11 9SN