



# Masonic

## Charitable Foundation

For Freemasons, for families, for everyone



Relief Chest Scheme

*Your guide to setting up a*  
**RELIEF CHEST**



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# Introduction

The Relief Chest Scheme was set up in 1986 (Registered charity number 281942) with the intention of assisting Freemasons throughout England and Wales to maximise the value of their charitable giving. The Relief Chest Scheme offers individual charitable accounts known as “Relief Chests”.

The scheme is designed to receive and distribute funds intended for charitable giving and provide efficient means of administering charitable funds.

Benefits of the Scheme:

- allow members to donate using a variety of methods
- reclaim Gift Aid tax on any eligible personal donations
- make donations to Masonic and non-Masonic charities
- manage record-keeping efficiently
- meet statutory requirements (eg HMRC, ICO, and Charity Commission)
- offer guidance on fundraising

Under the scheme a Lodge, Chapter or any other Masonic organisation recognised by the United Grand Lodge of England can open a Relief Chest (e.g. Mark, Royal Ark Mariners, Knights Templars, Rose Croix and Allied Masonic Degrees).

A Provincial Grand Lodge or Chapter may open a Relief Chest to manage a Festival, local or national fundraising campaigns.

The services provided by the Relief Chest Scheme relieve the chest holders of the burden of administration of charity funds, therefore saving time and resources allowing them to concentrate on fundraising.



# Features of a Relief Chest

## Ease of depositing

Donations can be made into a Relief Chest by:

- post
- telephone
- online

## Gift Aid Tax Relief

Under the government's Gift Aid scheme, The Relief Chest Scheme can reclaim an extra 25p in every pound from HM Revenue and Customs on eligible donations received into a Relief Chest.

## Ease of donating to charities

Requests to make donations from a Relief Chest to registered charities are processed and forwarded to charities regularly (monthly or if urgent immediately).

## Reports

Statements are issued monthly, quarterly or annually, listing all activities in a Relief Chest. Interim statements and subscribers lists are available on request.

## Costs

There is no charge for opening or administering a Relief Chest.

## Interest

A favourable interest rate is earned on the funds held in a Relief Chest and is tax free.

## Provincial Festivals and Appeals Relief Chests

In addition to the above any Festival and Provincial appeal Relief Chest holders receive:

- customised stationery (gift aid envelopes, donation Forms etc.)
- assistance for the Festival Committee in guiding Charity Stewards
- comprehensive performance reports
- online access
- text donation service
- online fundraising pages



# The Scheme's benefits at a glance



All services are free



No Administration work for the chest holder



All compliance and statutory requirements are met



Relieving the chest holder of any statutory obligations



Free stationery and donation forms



Free online fundraising facility



Regular statements




Gift Aid tax reclaim service



# Setting up a Relief Chest

A Relief Chest can be set up easily by following a few simple steps:

1. Pass a resolution in accordance with the usual practice of the Lodge, Chapter or other Masonic unit etc. (i.e. the Relief Chest holder).
2. Appoint a Representative.
3. Forward a completed application form to the Relief Chest Scheme.



**Masonic**  
Charitable Foundation

For the benefit of the community

## Application to open a Relief Chest

Date:  -  -  PLEASE USE BLOCK CAPITALS

**The members of:**

Name of Masonic Organisation (Lodge, Chapter, Mark Master Masons etc)

Unit Number (Lodge/Chapter No etc)

Masonic Order (Craft, Royal Arch, Mark Master Masons etc)

Province

**request that a Relief Chest be opened.**

Annual statement start month (Jan = 01)

**Secretary (or equivalent):**

Name (in capitals)
  Signature

**Details of Representative**


First Name

Surname

Address

Postcode   Telephone

Email

 **Data Protection Act 2018 - Privacy Notice**

The Relief Chest Scheme is committed to protecting your personal information. Our legal basis for collecting, processing and sharing personal information as set out in our Privacy Policy is based on the legitimate interest of the Relief Chest Scheme. To find out more about how we handle, share and store your personal information and how to amend or request a copy of any personal information we hold about you, please visit [www.mcfreliefchest.org.uk/privacy-policy](http://www.mcfreliefchest.org.uk/privacy-policy)


**DECLARATION**

I confirm that I have read and understood the Relief Chest Scheme Privacy Policy and agree to comply and abide by the Terms and Conditions.


I confirm I have read and understood the Relief Chest Scheme "Operating Manual and Rules".

**Relief Chest Representative:**

Name (in capitals)
  Signature



Please send this completed form to: Relief Chest Scheme, Masonic Charitable Foundation,  
50 Great Queen Street, London, WC2B 5AZ Tel: 020 3146 3352 Email: [reliefchest@mcf.org.uk](mailto:reliefchest@mcf.org.uk)



1 774 670 355474

Once the Relief Chest is set up, the nominated Relief Chest Representative will be notified by post. The Relief Chest becomes active immediately.



# Using a Relief Chest

A Relief Chest must be used:

- only to receive donations intended for charitable giving
- to make donations to
  - i) Masonic or non-Masonic charities
  - ii) any charitable causes recognised as charitable by HM Revenue & Customs
  - iii) a Provincial Festival or an Appeal
  - iv) or to an individual in distress

## Role of a Relief Chest Representative

A Relief Chest Representative acts as an agent for the Relief Chest holder (Lodge, Chapter etc.). It is the responsibility of the Relief Chest holder to decide and appoint one person to represent it, and to notify the Relief Chest Scheme each time a new Relief Chest Representative is appointed.

The Relief Chest Representative:


- is obliged to protect the personal information provided to him by the Relief Chest Scheme for Relief Chest management
- is expected to read, understand and comply fully with the Rules of the Relief Chest Scheme
- is the recipient of all correspondence from the Relief Chest Scheme, except as otherwise may be necessary (eg if we need to write to a Lodge Secretary regarding a dormant Relief Chest)
- is required to maintain a file containing records of the Relief Chest's activities such as receipts, acknowledgement letters and statements, and to pass this on to his successor
- is the only person authorised to contact the Relief Chest Scheme regarding a Relief Chest (e.g. to request a current balance, statements etc.)
- must be one of the signatories to a voucher requesting that a donation is to be made from a Relief Chest





# Changing a Relief Chest Representative

To amend the records held by the Relief Chest Scheme, a Change of Representative form must be completed and forwarded to the Relief Chest Scheme.



**Change of Relief Chest Representative**

PLEASE USE BLOCK CAPITALS

With effect from: --

the Representative of the following Relief Chest:

Name of the Relief Chest

Relief Chest No

will be:

First Name

Surname

Address

Postcode

Telephone  Mobile

Email


OUTGOING Representative:

Full Name

Approved by the Secretary (or equivalent):

Name (in capitals)

Signature



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**MUST BE COMPLETED BY THE NEW REPRESENTATIVE**


**DECLARATION**

I confirm I have read and understood the Relief Chest Scheme Privacy Policy and I agree to comply and abide by the Terms and Conditions. I confirm I have read and understood the Relief Chest Scheme "Operating Manual and Rules".


Relief Chest Representative:

Name (in capitals)

Signature



Please send this completed form to: Relief Chest Scheme  
Masonic Charitable Foundation, 60 Great Queen Street, London, WC2B 5AZ  
Telle: 020 3146 3352 Email: [reliefchest@mcf.org.uk](mailto:reliefchest@mcf.org.uk)



1 774670 338310

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# Donations into a Relief Chest

Donations can be made into a Relief Chest:

- Online
  - ✓ Setup a Direct Debit
  - ✓ Make a donation
  - ✓ Create a fundraising page or sponsor a participant
- By post
  - ✓ Cheque
  - ✓ Credit or debit card
  - ✓ Direct Debit
  - ✓ Charity voucher (CAF, KKL, CT etc.)
- By telephone
  - ✓ Credit or debit card
  - ✓ Set up a Direct Debit
  - ✓ Text
- By bank transfer
- Via a local banking service

## Donations Online – Paperless Direct Debits

A donor can make regular donations by setting up a Direct Debit instruction online. The process is straightforward and should take no more than a few minutes.

### Benefits of Direct Debits:

- Clear and simple sign-up process
- Bank and other details are verified at the sign-up stage
- Reduced time spent querying details
- Paperless system
- Not reliant on a postal service
- Safe and secure process via the charity's website
- Gift Aid tax relief (where applicable) can be reclaimed
- Same safeguards and guarantees as paper Direct Debits

How it works:

- visit <https://mcf.org.uk/donate/>
- select **Regular Donation**
- complete and submit the form



The donor will then receive an on screen confirmation of their sign-up. The Direct Debit Guarantee will be displayed on screen with an option to save it for their records. Once the Direct Debit instruction sign-up details have been received successfully and processed by the Relief Chest Scheme, to comply with the Direct Debit rules the donor will receive a letter by post confirming their instruction. The Relief Chest Representative will receive a copy of the letter confirming the setup of a regular donation into the Relief Chest.

## Donations Online – make a single donation

How it works:

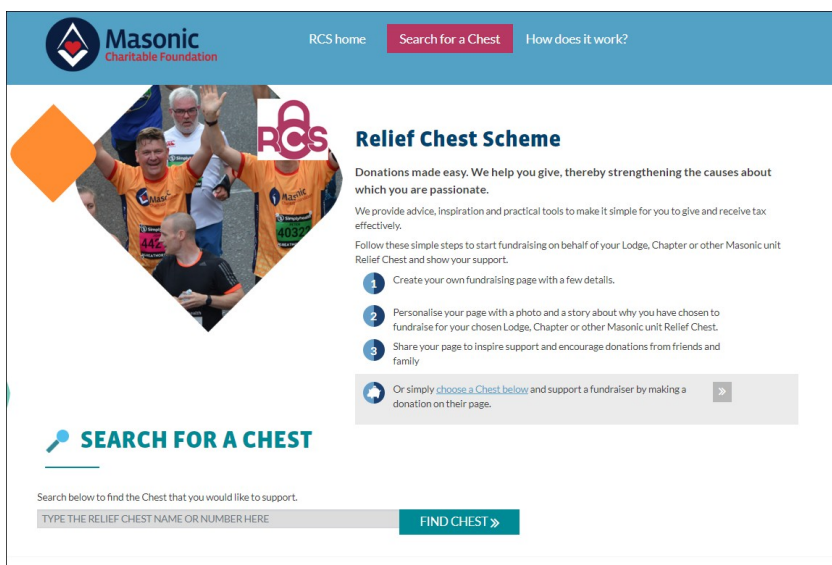
- visit <https://rcs.mcf.org.uk/>
- search for the Relief Chest name or number
- complete donation details and submit the form

## Donations Online – Fundraising Pages

Fundraising pages enable donors to make a one-off donation or sponsor a fundraiser online.

How it works:

- visit <https://rcs.mcf.org.uk/>
- search for the Relief Chest name or number
- sponsor a fundraiser or create own fundraising page



**Masonic Charitable Foundation** RCS home Search for a Chest How does it work?

**Relief Chest Scheme**

Donations made easy. We help you give, thereby strengthening the causes about which you are passionate.

We provide advice, inspiration and practical tools to make it simple for you to give and receive tax effectively.

Follow these simple steps to start fundraising on behalf of your Lodge, Chapter or other Masonic unit Relief Chest and show your support.

- 1 Create your own fundraising page with a few details.
- 2 Personalise your page with a photo and a story about why you have chosen to fundraise for your chosen Lodge, Chapter or other Masonic unit Relief Chest.
- 3 Share your page to inspire support and encourage donations from friends and family

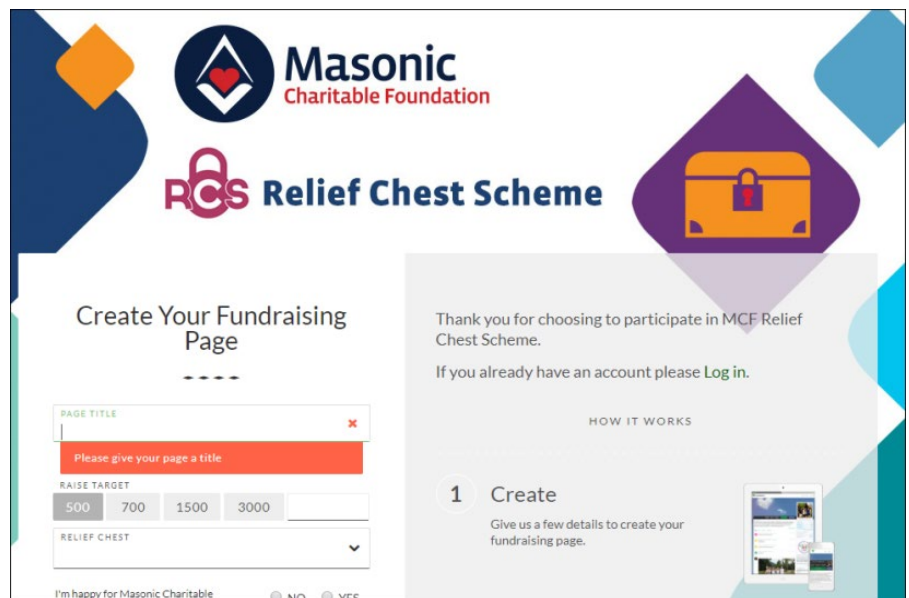
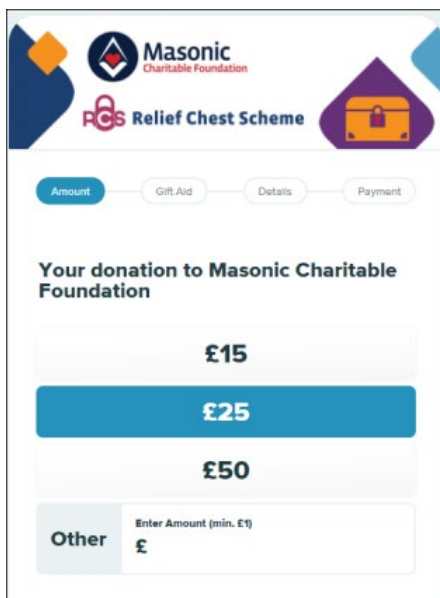
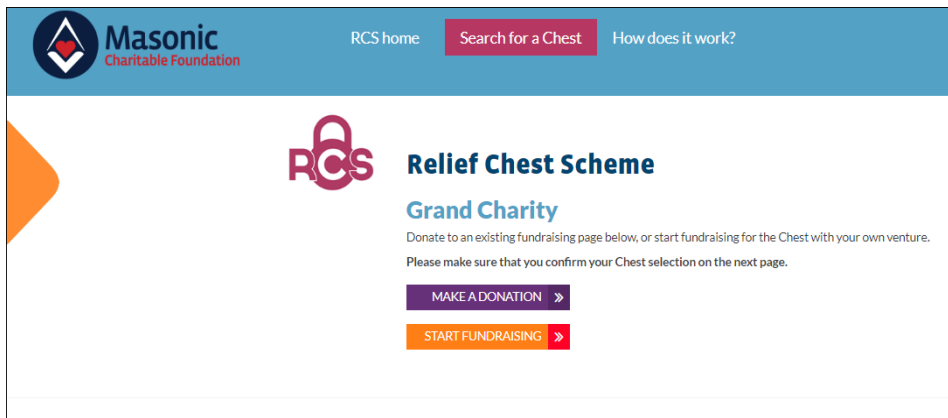
Or simply [choose a Chest below](#) and support a fundraiser by making a donation on their page.

**SEARCH FOR A CHEST**

Search below to find the Chest that you would like to support.

TYPE THE RELIEF CHEST NAME OR NUMBER HERE **FIND CHEST >>**





## Benefits of a Fundraising Page:

- Donors can set up their own personalised supporter pages for sponsored events
- Receive donations
- Donations can be made anywhere, at any time, on a PC, Mac, mobile or tablet device, through a secure payment site
- Easily integrated with social media
- No charges will be deducted - the Relief Chest will receive the full value of any donations
- Option to reclaim Gift Aid on the donations



# Personal Donations - by Post


## Single Donations

A donor can make a single donation by sending a cheque payable to “The Relief Chest Scheme” together with a single donation form.


These forms are available from the Relief Chest Scheme office or to download from the website <https://mcf.org.uk/resources/relief-chest-resources/?lm-page=1>

### Single donation form type 1

☐

**Single Donation Form**

☐



**This form is for personal donations only**

Personal Details

First name

Last name

Address

Postcode

Donation Details

I enclose:

☐ a cheque

☐ a charity voucher (e.g. CAF/KKL)

Donation amount: £

Lodge/Chapter name

Lodge/Chapter no.

Relief Chest No.

Please ensure all cheques are made payable to the Relief Chest Scheme.

Gift Aid Declaration

**Boost your donation by 25p of Gift Aid for every £1 you donate**  
If you are a UK tax payer, under the Government's Gift Aid Scheme, the Relief Chest Scheme (The Grand Charity Registered Charity Number 281942) can reclaim the tax you have already paid on your donation and add it to the value of your gift. Gift Aid is reclaimed by the charity from the tax you pay for the current tax year.  
Your address is needed to identify you as a current UK taxpayer.

**Please read the declaration below before you tick the relevant box(es) and date the form.**

I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.  
Please treat as Gift Aid donations, all qualifying gifts of money made:

On this donation only

in the future

in the past 4 years


If you do not wish for tax to be reclaimed, please tick here:

Signature

Date


Please notify us if you want to cancel this declaration, change your name or home address or no longer pay sufficient tax on your income and/or capital gains.

Send this completed form to: Relief Chest Scheme, Masonic Charitable Foundation, 60 Great Queen Street, London WC2B 5AZ  
Tel: 020 3146 3352 Email: [reliefchest@mcf.org.uk](mailto:reliefchest@mcf.org.uk)

 **Data Protection Act 2018 - Privacy Notice**

The Relief Chest Scheme is committed to protecting your personal information. Our legal basis for collecting, processing and sharing personal information as set out in our Privacy Policy is based on the legitimate interest of the Relief Chest Scheme.

To find out more about how we handle, share and store your personal information and how to amend or request a copy of any personal information we hold about you, please visit [www.mcfreliefchest/privacypolicy](http://www.mcfreliefchest/privacypolicy)



1 774 670 32935

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## Single donation form type 2 (Combined Regular and Single donation form)



### Making a donation into a Relief Chest Regular & Single Donation Form



Relief Chest Scheme Masonic Charitable Foundation, 60 Great Queen Street  
London WC2B 5AZ  
T: 020 3146 3352 E: [reliefchest@mcf.org.uk](mailto:reliefchest@mcf.org.uk) W: [www.mcf.org.uk/reliefchest](http://www.mcf.org.uk/reliefchest)

**The Freemasons' Grand Charity**  
(Incorporated in England)

Please fill in the whole form using a ball point pen and send to:  
The Freemasons' Grand Charity, 60 Great Queen Street, London WC2B 5AZ

**Name and full postal address of your bank or building society**

To: The Manager Bank/Building Society

Address

Postcode

Name(s) of Account Holder(s)

Bank/Building Society Account Number

Branch sort code

Banks and building societies may not accept Direct Debit instructions for some types of account

**Instruction to your Bank/Building Society to pay by Direct Debit**

**Reference number**  
9 2 4 6 3 5 2

**Reference number**  
/

**Instruction to your bank or building society**  
Please pay The Grand Charity of the United Grand Lodge of England Direct Debit from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with The Grand Charity of the United Grand Lodge of England and, if so, details will be passed electronically to my bank/building society.

**Signature**

Date: / /

**Regular Donations into a Relief Chest**

I promise to pay you the actual sum of £ / -

every Month ☐ Year ☐ 3 months ☐ 6 months ☐

Payments are to start on 1/1 / /

(This date must be at least two months after the date that you sign the form)

and are to continue for a period of One ☐ Two ☐ Four ☐ Six ☐

or ☐ years thereafter, or until my death, whichever is earlier

Please allocate this Regular Donation to:

Lodge/Chapter name

Lodge/Chapter No. Relief Chest No.

**Single Donations into a Relief Chest**

Please tick one or more of the following as applicable:

☐ I enclose a cheque payable to The Relief Chest Scheme for the sum of £ / -

☐ I enclose a donation of £ / -

on or about the / /

Please allocate this Single Donation to:

Lodge/Chapter name

Lodge/Chapter No. Relief Chest No.

**Gift Aid**

**Boost your donation by 25p of Gift Aid for every £1 you donate**

If you are a UK tax payer, under the Government's Gift Aid Scheme, the Relief Chest Scheme (The Grand Charity Registered Charity Number 281942) can reclaim the tax you have already paid on your donation and add it to the value of your gift.

Gift Aid is reclaimed by the charity from the tax you pay for the current tax year.

Your address is needed to identify you as a current UK taxpayer.

**DECLARATION**

I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.

In order to Gift Aid your donation you must tick the relevant box(es) below:

☐ on this donation only ☐ in the past 4 years ☐ in the future

Please notify us if you:

1. Want to cancel this declaration
2. Change your name or your home address
3. No longer pay sufficient tax on your income and/or capital gains.

Date: / /

**Personal Details:**

Please enter your name and address in FULL using BLOCK CAPITALS:

Title: ☐ Mr ☐ Mrs ☐ Dr ☐ Other (-----)

Surname: /

Forename(s): /

Address: /

Postcode: / / / /

Telephone: /

Signature: /

cannot be reclaimed unless the relevant box(es) of the Gift Declaration are ticked.

If you pay Income Tax at the higher or additional rate and want to claim the additional tax relief due to you, you must include all Gift Aid donations on your Self-Assessment tax return or ask Revenue and Customs to adjust your tax code.

For further information on Gift Aid, please visit [www.hmrc.gov.uk](http://www.hmrc.gov.uk)

**Do not increase your donation by letting reclaim your tax?**

Gift Aid your donation, we can reclaim 25p of tax on £1 you give.

*giftaid it*

#### Data Protection Act 2018 - Privacy Notice

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Find out more about how we handle, share and store your personal information and how to amend or request a copy of any personal information we hold about you, please visit [reliefchest/privacypolicy](http://reliefchest/privacypolicy)

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# Donations by Post – Credit or Debit Cards

Donors can make credit or debit card donations completing a credit/debit card donation form and sending to the Relief Chest Scheme.


This form is available from the Relief Chest Scheme office or to download from the website <https://mcf.org.uk/resources/relief-chest-resources/?lm-page=1>

Complete the form and post to the Relief Chest Scheme office.



**Masonic**  
Charitable Foundation  
for Freemasons, by Freemasons, for everyone

**Credit/Debit Card Donation Form**



We accept donations by Mastercard, Visa, Visa Debit and Maestro

**Card Details**

Name as on card

Card no.  Expiry Date (MMYY)

CV2 no.  Start Date (MMYY)  Issue no.

**Donation Details**

Donation amount £  Relief Chest no.

Lodge/Chapter name

Lodge/Chapter no.

Signature

**Personal Details**

First Name(s)

Surname

Address

Postcode

**Gift Aid Declaration**

**Boost your donation by 25p of Gift Aid for every £1 you donate**  
If you are a UK tax payer, under the Government's Gift Aid Scheme, the Relief Chest Scheme (The Grand Charity, Registered Charity Number 281942) can reclaim the tax you have already paid on your donation and add it to the value of your gift.  
Gift Aid is reclaimed by the charity from the tax you pay for the current tax year.  
Your address is needed to identify you as a current UK taxpayer.


**Please read the declaration below before you tick the relevant box(es) and date the form.**  
I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.  
Please treat as Gift Aid donations, all qualifying gifts of money made:


On this donation only ☐ in the future ☐ in the past 4 years ☐

If you do **NOT** wish for tax to be reclaimed, please tick here ☐ Date

Please notify us if you want to cancel this declaration, change your name or home address or no longer pay sufficient tax on your income and/or capital gains.

Send this completed form to: **Relief Chest Scheme, Masonic Charitable Foundation, 60 Great Queen Street, London WC2B 5AZ Tel: 020 3146 3333**

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1 774679 784608



Regular donations can be made by setting up a Direct Debit instruction. The donations can be made monthly, quarterly or annually for a set period of time (e.g. three, four or five years or until further notice).

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Donations can be made by various charity vouchers such as CAF, KKL, CT etc. by post. Complete donor and Relief Chest details on the voucher and return to the Relief Chest office by post. The Relief Chest team will then forward the voucher for payment to the relevant organisation. The Relief Chest will be credited with the donation once the scheme has received cleared funds in the scheme's bank account.

Non-member (personal) donations can be made by completing a miscellaneous payment form and sending it to the Relief Chest Scheme together with a cheque made payable to “Relief Chest Scheme”.

Typical miscellaneous donations include raffles, sales of regalia, penny collections, barbecues etc.

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## Donations by Telephone – Credit or Debit Cards



Donor contacts the Relief Chest Scheme on **020 3146 3345** –Monday to Thursday 9.30am to 4.30pm, Friday 9.30am to 3.30pm to make a donation using a credit or debit card

## Donations by Telephone – Direct Debit



- Donor contacts the Relief Chest Scheme on the dedicated telephone line – **020 3146 3346** – Monday to Thursday 9:30am to 4:30pm, Friday 9:30am to 3:30pm)
- Donor needs the following information:
  - \* Name and address
  - \* Bank Sort Code and account number
  - \* Amount of donation
  - \* Frequency and duration
  - \* Relief Chest, Lodge, Chapter details
  - \* Gift Aid declaration

## Donations by Telephone (Mobile) – Text

(This facility currently available to Provinces in Festivals and Appeals only)



Donor sends a text to a number allocated to a specific Relief Chest

- A text is sent to the donor confirming donation With a link requesting further information for allocation and Gift Aid purposes
- Donation is processed by Relief Chest Scheme and credited against the donor



## Bank Transfers

A donor can make a payment into a Relief Chest by bank transfer electronically from their own account or a Relief Chest Representative can arrange a transfer from their Lodge/Chapter account. Please contact the Relief Chest Scheme for the bank details and further instructions.

## Local Banking

Relief Chest Representatives can deposit the charitable collections locally into any NatWest branch.

How it works:

- The Relief Chest Representative receives a paying in book
- Donations are collected and paperwork is completed
- The collection is banked at a local NatWest branch
- The duplicate paying in slip is sent together with any donation forms to the Relief Chest Scheme

For more information on this service or to request a paying in book, please contact the Relief Chest Scheme.



# Gift Aid Envelope Scheme

These are ideal for alms collections at meetings. The typical process for the collection and the forwarding of donations to the Relief Chest Scheme is set out below:

1. The donor completes the tear-off slip on the gift aid envelope then puts it inside the envelope with cash or a cheque and seals the envelope.
2. The Relief Chest Representative and/or Treasurer (preferably both together) count the contents from each envelope and makes sure that it agrees with the amount entered on the tear-off slip.

The image shows two forms used in the Gift Aid Envelope Scheme. The left form, titled 'Making a donation into a Relief Chest', is from the Masonic Charitable Foundation and includes a 'Thank You' section with fields for donor details and donation information. The right form, titled 'Envelope Verification Schedule', is for recording donation details and totals, including fields for donor name, address, donation amount, and verification details.

3. The money is banked into the Lodge/Chapter bank account.
4. The Relief Chest Representative then
  - I. completes the envelope verification schedule
  - II. make a cheque payable to the Relief Chest Scheme for the total amount
  - III. post the envelope tear off slips, verification form and the cheque to the Relief Chest Scheme office.



1. The tear-off slip on the Gift Aid Envelope must be completed by the donor and then put inside the envelope with the cash or cheque donation.

[illegible]

- First name and surname
- House name or number and postcode
- Amount of donation
- Date of donation
- Tick the relevant box



- 
- A close-up photograph of a hand holding a pen, filling out a form. The form has a grid-like structure with various fields and checkboxes. The hand is positioned over one of the fields, and the pen is in the process of writing.

[illegible]

3. The money is banked into the Lodge/Chapter bank account and the Envelope Verification Schedule is completed.
4. The Relief Chest Representative or Treasurer draws a cheque made payable to **"Relief Chest Scheme"** for the total amount.
5. The cheque, envelope verification schedule and all the tear-off slips are sent to:  
Relief Chest Scheme,  
Masonic Charitable Foundation, 60 Great Queen Street,  
London WC2B 5AZ.  
Tel: 020 3146 3352



## Gift Aid Sponsorships

A member or other individual may hold a sponsored fundraising event to benefit a Relief Chest. Donations must be collected using a sponsorship form provided by the Relief Chest Scheme. These forms can be personalised for the event.

### Collecting and forwarding donations:

- Arrange for sponsors to complete the form
- Collect the donations from sponsors

[illegible]



**Masonic Charitable Foundation**  
 40 Grosvenor Gardens, London, W1A 3AB



**RCS**  
 Royal College of Surgeons

## Making a donation into a Relief Chest Sponsorship Verification Form

**Event:** \_\_\_\_\_ **Date:** \_\_\_\_/\_\_\_\_/\_\_\_\_

Details of person submitting sponsorship form and cheque(s):

**Given Name(s):** \_\_\_\_\_

**Surname:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_

**Postcode:** \_\_\_\_\_

**Lodge/Chapter no:** \_\_\_\_\_

**Lodge/Chapter name:** \_\_\_\_\_

**Relief Chest no:** \_\_\_\_\_

**Number of sponsorship forms:**

**Number of cheque(s) being submitted:**

**Total amount of cheque:**

**Signature** \_\_\_\_\_ **Date:** \_\_\_\_/\_\_\_\_/\_\_\_\_

Please forward the sponsorship forms, cheques and schedule to: Relief Chest Scheme, Masonic Charitable Foundation 60 Great Queen Street, London WC2B 6AZ Tel: 020 3146 3352

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This Relief Chest Scheme is committed to protecting your personal information. Our legal basis for collecting, processing and sharing personal information is set out in our Privacy Policy. It is based on the legitimate interest of the Relief Chest Scheme.

If you would not wish to have details, where and when your personal information and how to attend or request a copy of any personal information we hold about you, please visit [www.mcfcharitablefoundation.org/privacypolicy](http://www.mcfcharitablefoundation.org/privacypolicy)

500715

- Complete the sponsorship verification form
- Send the verification schedule together with the sponsorship forms and the cheque(s) payable to The Grand Charity covering the amount, to the Relief Chest Scheme

Where possible please encourage the participants to use the online fundraising platform for sponsorships. The online sponsorship is more convenient, easy to share with friends and families via various social media platforms, no cash handling and if eligible the gift aid tax is guaranteed to be reclaimed. With paper sponsorship forms if not completed properly or writing is illegible the scheme cannot reclaim gift aid tax.



# Donations from a Relief Chest

Funds held in a relief chest can be made to a registered charity, a charitable cause recognised by HMRC, Provincial Festivals/Appeals or to an individual in distress.



Payment from a Relief Chest can be requested by following a few easy steps:

- The Relief Chest holder decides to make a donation
- The donation is then approved in open Lodge etc. according to the practice of their unit
- The Relief Chest Representative completes a payment request form (electronic/paper)
- The payment request is sent to the Relief Chest Scheme office

The Relief Chest Scheme then process the payment request and make payments to the beneficiary. Donations from Relief Chests are made fortnightly or if requested issued immediately. Payments may be issued to the

- a) Charity (by cheque or BACS)
- b) Relief Chest holder for presentation (cheque, if requested)
- c) Provincial Festival/Appeal Relief Chest ( by internal transfer immediately )
- d) Chest holder (by cheque for a relief of distress payment, issued immediately)





# Payment request forms

Payment from a relief chest can be made using an electronic form (e-voucher), Blue special voucher or a Green normal voucher.

## Electronic form

**An e-voucher** allows a Relief Chest Representatives to submit a request for payment online. Multiple payment requests can also be made using one online form. This is a secure, paperless approval process and makes the payment request and counter signature process quick and seamless. A short video on how to submit an e-voucher available on website <https://mcf.org.uk/e-voucher/> or PDF to download <https://mcf.org.uk/wp-content/uploads/2020/05/E-voucher-user-guide-V11.pdf>.

The process is;

- Relief Chest Representative visits <https://mcf.org.uk/e-voucher/>
- Find their Relief Chest and sign up to register
- Create a voucher ( find the recipient charity, add amount, confirm)
- Send the request to the second signatory
- Second signatory approves and submit the request to Relief Chest Scheme

## Paper form

### Blue Vouchers - Donations to Masonic Charities

A blue voucher is to be used for donations to the general funds of the

- Masonic Charitable Foundation (MCF)
- Former Central Masonic Charities (FGC, MSF, RMTGB, RMBI) and any subsidiary fund listed on the voucher subsidiary fund listed on the voucher.

**RGS**  
Relief Chest Scheme  
FOR THE

TO:- **Relief Chest Scheme  
Masonic Charitable Foundation  
66 Great Queen Street  
London  
WC2B 5AZ**

Voucher No: \_\_\_\_\_

Date:  /  /

In accordance with a Resolution passed by the Members, please donate from the Relief Chest named above to the following charity:

- ☐ Freemasons' Grand Charity (General Funds)
- ☐ Royal Masonic Trust for Girls and Boys
- ☐ Ruspoli Fund (RMTGB)
- ☐ Masonic Charitable Foundation General Fund (MCF)
- ☐ Royal Masonic Benevolent Institution
- ☐ Good Neighbour Fund (RMBI)
- ☐ Masonic Samaritan Fund
- ☐ Lifeites

The sum of £  (AMOUNT IN FIGURES)

(AMOUNT IN WORDS)  
and debit the balance of the Relief Chest accordingly:

Signature: \_\_\_\_\_  
Relief Chest Representative

Signature: \_\_\_\_\_  
Secretary/Committee/Deputy Secretary/Master/Procurator/Co.

First Name: \_\_\_\_\_

SEE NOTES OVERLEAF.

0 00000 000000





## Green Vouchers - Donations to Non- Masonic Charities

A green voucher should be used to:

- make donations to non-Masonic registered charities
- make donations to any other Masonic charity not listed on the blue voucher
- transfer funds to a Provincial Festival or any other Appeal Relief Chest

**Masonic Charitable Foundation**  
For Freemasons, for families, for everyone

**For Non-Masonic Charities**  
(MAY ALSO BE USED TO TRANSFER DONATIONS TO FESTIVAL/APPEAL CHESTS)

**Voucher No:** \_\_\_\_\_

FOR THE \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

In accordance with a Resolution passed by the Members, please donate from the Relief Chest named above to the following charity or festival/appeal:

CHARITY NAME OR FESTIVAL/APPEAL: \_\_\_\_\_

REGISTERED NO OR CHEST NO: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

POSTCODE: \_\_\_\_\_

The sum of £ \_\_\_\_\_

(AMOUNT IN WORDS) \_\_\_\_\_

and debit the balance of the Relief Chest accordingly.

Signature \_\_\_\_\_ Signature \_\_\_\_\_

Relief Chest Representative Secretary/Scribe/Recorder/Treasurer/Almoner/Etc.

Print Name \_\_\_\_\_ Print Name \_\_\_\_\_

**Masonic Charitable Foundation**  
60 Great Queen Street  
London WC2B 5AZ  
Tel: 020 3146 3352  
SEE NOTES OVERLEAF

**RCS**  
Relief Chest Scheme  
Nov17

1 003080 810001

- If the transfer is to be allocated to individuals for honorific purposes, please complete the Relief Chest Transfer Allocation Form with the details of the members.
- Please ensure the total on the voucher matches the total on the form.

**Masonic Charitable Foundation**  
For Freemasons, for families, for everyone

**Relief Chest Transfer Allocation Form**  
Use this form to allocate funds transferred to individual donor

**RCS**  
Relief Chest Scheme

Voucher No \_\_\_\_\_ Relief Chest No \_\_\_\_\_

	First Name	Surname	House Name/No.	Post Code					Amount (£)		
1	John	Smith	123	A	B	1	2	3	C	D	30.00
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											
									Total of Individual Donations		£
									Lodge/Chapter Donation		£
									Total to be transferred (please ensure this matches the total on the voucher):		£

Please send this form with the completed voucher to: Relief Chest Scheme, Masonic Charitable Foundation, 60 Great Queen Street, London, WC2B 5AZ.  
Telephone 020 3146 3352 Email: reliefchest@mcf.org.uk

**Data Protection Act 2018 - Privacy Notice**  
The Relief Chest Scheme is committed to protecting your personal information. Our legal basis for collecting, processing and sharing personal information as set out in our Privacy Policy is based on the legitimate interest of the Relief Chest Scheme.  
To find out more about how we handle, share and store your personal information and how to amend or request a copy of any personal information we hold about you, please visit [www.mcf.org.uk/reliefchest/privacypolicy](http://www.mcf.org.uk/reliefchest/privacypolicy)

**MAY18**



## Donation – for an Individual in Distress

Funds in a Relief Chest may be used to assist an individual in distress. There is no requirement that the individual receiving the assistance is a Freemason or a dependant of a Freemason and there is no limit to the amount or number of donations they may receive. Each donation may be of any amount, subject to the funds available in the relevant Relief Chest.

Vouchers must **not** be used to authorise donations to an individual in distress. To donate to an individual in distress a letter printed on the Relief Chest Holder's headed paper should be sent to the Relief Chest Scheme. It should provide details of the individual in distress and an assurance from the Relief Chest Holder that appropriate due diligence has been undertaken to confirm the need for relief. A sample letter is provided below:

## Lodge/chapter headed paper

We have made due enquiry and we are satisfied that:

Full Name  
House No  
Street  
Town  
County  
POST CODE

is suffering from distress and is in need. The [insert RELIEF CHEST HOLDER'S NAME] requests that the sum of [insert AMOUNT IN WORDS] pounds £..... be donated for the relief of [insert NAME] distress and be debited against Relief Chest No. [insert RELIEF CHEST NUMBER]

[Signed] / NAME

(Relief Chest Representative)

[Signed] / NAME


(Master / Secretary / Treasurer / Almoner / Charity Steward)



# Relief Chest Statement

On behalf of the Relief Chest holder, the Relief Chest Representative will receive a detailed annual statement covering the Relief Chest's activity. The Relief Chest holder designates a twelve month period for annual reporting when opening a Relief Chest. Interim statements are issued on request.

Mr RC Officer  
Freemasons Hall  
60 Great Queen Street  
London  
WC2B 5AZ



**Relief Chest Scheme**  
Masonic Charitable Foundation  
60 Great Queen Street, London WC2B 5AZ  
020 31 46 3333 | [reliefchest@mcf.org.uk](mailto:reliefchest@mcf.org.uk)  
[www.mcf.org.uk/reliefchest](http://www.mcf.org.uk/reliefchest)

**STATEMENT FOR RELIEF CHEST**

Covering period from 01/04/2017 to 30/11/2017 for the

**RELIEF CHEST NAME**


**RELIEF CHEST No. XXXX**

	Totals £
A. Net balance in Relief Chest at beginning of period	0.00
B. Total contributions under RPP/Regular Donation during period	0.00
C. Total tax payments for RPP/Regular Donation received during period	0.00
D. Total Gift Aid receipts during period (GA+GAE+GAS)	00.00
E. Total tax repayments under Gift Aid received during period	00.00
F. Total miscellaneous receipts during period	0.00
G. Total interest allocated during period	0.00
H. Total of all receipts during period (B+C+D+E+F+G)	00.00
I. Total donations actually made during period	0.00
J. Net balance at end of period (A+H-I)	00.00
K. Donations authorised but not yet made at end of period	0.00
L. Balance available for further donations (J-K)	00.00

Details are attached.

Wednesday November 1 2017 11:34 AM

Page 1



**Masonic**  
Charitable Foundation

On 1 April 2016, the Relief Chest Scheme (Grand Charity registered charity number 281942) became part of the Masonic Charitable Foundation, a new charity for Freemasons, for families, for everyone. Please visit [mcf.org.uk](http://mcf.org.uk) for further information.




# Relief Chest Subscribers List

**Chest Subscribers List**

**Relief chest No:XXXX - Relief chest name**

Mr RC Officer  
Freemasons Hall  
60 Great Queen Street  
London  
WC2B 5AZ




**Relief Chest Scheme**  
Masonic Charitable Foundation  
60 Great Queen Street, London WC2B 5AZ  
020 3146 3333 | reliefchest@mcf.org.uk  
www.mcf.org.uk/reliefchest

Name	Ref.	First Payment	Frequency	Amount	Final Payment	Total Paid	Tax Claimed	Status
<b>Regular Donation</b>								
Smith AB	16305132	11/10/15	Monthly	£10.00	11/09/14	£0.00	£0.00	Cancelled
End Of Report								

Wednesday November 1 2017 11:34 AM

Page 1 of 1



On 1 April 2016, the Relief Chest Scheme (Grand Charity registered charity number 281942) became part of the Masonic Charitable Foundation, a new charity for Freemasons, for families, for everyone. Please visit [mcf.org.uk](http://mcf.org.uk) for further information.

On request a Subscribers list can be provided to the Relief Chest Representative.  
This will show a list of all the regular donors (Direct Debit)





- To set up a Direct Debit instruction with your bank if you elect to donate regularly
- To submit a gift aid tax reclaim to HMRC, if you choose to gift aid your donation
- To identify you as the Relief Chest representative, if you have been elected for the role
- To send you Relief Chest communications relating to your role as the representative, such as receipts, thank you letters, statements and other correspondence in accordance with the Relief Chest Scheme Operating Manual and Rules
- To update, where applicable, the Honorific Evaluation system (HONE) of the MCF. The HONE system uses personal information from donors who have made donations specifically to the MCF, by donating to the MCF general fund or donating to the MCF as part of a Provincial Festival in support of the MCF, to administer the MCF permanent honorifics programme and to inform a donor of any MCF honorific qualifying level reached as a result of any donation(s).

## SHARING YOUR PERSONAL INFORMATION

The Relief Chest Scheme will not sell, share or distribute your personal information to any third party for marketing or other purposes. We will not use or share your personal information except for the purposes specified below to process a donation or to identify you as a Relief Chest representative.

## WE MAY SHARE YOUR PERSONAL INFORMATION WITH:

- **UNITED GRAND LODGE OF ENGLAND**
  - i) To identify you as a member of a Lodge, Chapter or other Masonic organisation, e.g. Rose Croix, Mark Master Masons
  - ii) To allocate donations to the correct Lodge or Chapter for honorific purposes in connection with a Festival/Appeal
  - iii) To identify you as a donor
- **YOUR BANK**
  - i) To lodge a Direct Debit Instruction to facilitate regular donations into a Relief Chest
  - ii) To request regular payments (monthly, quarterly, annually etc.)
  - iii) To make amendments to the Direct Debit instruction (change bank account details, cancel the Direct Debit etc.)
- **HMRC**
  - i) To submit a gift aid tax reclaim for gift aided donations (where eligible)
  - ii) To refund any tax (where gift aid is reclaimed in error/not eligible)
- **RELIEF CHEST HOLDER (RELIEF CHEST REPRESENTATIVE/S)**
  - i) We may share your personal information with the chest holder i.e. Relief Chest representative/s, to issue acknowledgements, receipts,





- subscribers lists or regular statements according to the Relief Chest Scheme Operating Manual and Rules
- ii) Your personal information will be shared with the Relief Chest holder and its representatives for honorific purposes

The Relief Chest Scheme may share your details with third parties including:

- **OTHER REGISTERED CHARITIES**

- i) When making donations from a Relief Chest to a registered charity, the Relief Chest representative's personal details (name, address and relief chest details) are forwarded to issue a receipt/thank you letter
- ii) Personal information of donors may be forwarded to legacy Masonic charities who are taking part in festivals (Royal Masonic Trust for Girls and Boys, Royal Masonic Benevolent Institution, Masonic Samaritan Fund and the Freemasons Grand Charity) for honorific purposes and to issue a receipt/thank you letter

The Relief Chest Scheme may use third party processing systems to check personal information you provide or for mailing purposes:

- **BOTTOMLINE TECHNOLOGIES**

- i) When setting up a paperless Direct Debit (online or by phone) to verify bank details, ownership of the account and your address
- ii) To print and post thank you letters, receipts and Relief Chest monthly statements to donors and Relief Chest representatives

## **SAFEGUARDING YOUR PERSONAL INFORMATION**

All personal and other information collected from donors is stored securely by the Relief Chest Scheme according to the Relief Chest Scheme document Retention Schedule. Records are kept only for as long as the Relief Chest is legally required. Information is retained in accordance with statutory and regulatory requirements and is destroyed securely at the end of the retention period.

Personal information collected electronically by online forms is encrypted. The Relief Chest Scheme has appropriate technical controls in place to protect all personal and other information and these are subject to routine monitoring.

Personal and other information collected are not transferred overseas, and the servers on which such information is stored are located in the U.K.

Relief Chest staff are trained to handle personal information in accordance with appropriate data protection policies and procedures.

## **YOUR PERSONAL INFORMATION AND YOUR RIGHTS ACCESSING AND UPDATING YOUR PERSONAL INFORMATION**



- You have a right to ask for details about the information we hold about you
- You have a right to ask us to stop processing your personal information if it is not necessary for the purposes for which you provided the details (e.g. to process a donation)
- You have a right to rectify your personal data to ensure the information we hold about you is accurate and up to date
- You have a right to ask us to erase/delete any personal information we hold about you, unless the Relief Chest needs to retain it for a legitimate purpose

## OUR THIRD PARTY DATA PROCESSORS

The Relief Chest Scheme may receive your personal information from third parties such as Everyday Hero for online donations, Vir2 Limited for text donations and Charities Aid Foundation (CAF) Just Giving, etc. who share information with us in order to pass your donation into a Relief Chest. These independent third parties will only do so when you have indicated that you wish to support the Relief Chest Scheme of the Masonic Charitable Foundation. When you provide your personal details, look for and check the privacy policy of such organisations to find out how they will process your information.

## UPDATING OUR PRIVACY POLICY

We may update or amend this Privacy Policy from time to time, for legal compliance or to meet our changing business requirements. When we update our Privacy Policy, we will take appropriate measures to inform you. Any updates or amendments will be posted on the Website [www.mcf.org.uk](http://www.mcf.org.uk)

## HOW TO CONTACT US

If you have any concerns or queries about your personal information, please contact our data protection lead:

Name: Leslie Hutchinson

Email: [info@mcf.org.uk](mailto:info@mcf.org.uk)

Phone: 020 3146 3333

Post: Data Protection Lead, Relief Chest Scheme, Masonic Charitable Foundation, 60 Great Queen Street, London WC2B 5AZ

GDPR/pp/15May 2018/final





# Statement of Responsibilities for Relief Chest Representatives



**Masonic**  
Charitable Foundation

## RELIEF CHEST SCHEME

### STATEMENT OF RESPONSIBILITIES FOR RELIEF CHEST REPRESENTATIVES

This policy is effective from 25 May 2018

#### INTRODUCTION

This statement of responsibilities sets out how the Relief Chest Scheme expect the Relief Chest Representatives to use and protect personal and other information provided.

The Relief Chest Scheme is committed to ensuring the privacy and confidentiality of personal information provided to us. Any personal information provided to you as the Relief Chest Representative by the Relief Chest office to help you administer your Relief Chest must be treated as private and confidential. This document governs the use of information provided to you as the Relief Chest Representative in any format including paper or electronic format.

#### ACCEPTANCE

By completing and returning either of the forms:

1. Relief Chest Application
2. Change of Representative
3. Access to Relief Chest Online
4. Relief Chest Online reporting

you agree and accept the terms and conditions set out in this document.

#### PERSONAL INFORMATION

The Relief Chest Scheme's Privacy Policy sets out how we treat personal and other information we collect. To obtain a copy contact the Relief Chest Scheme office or visit [www.mcf.org.uk/reliefchest](http://www.mcf.org.uk/reliefchest)

#### ACCESS SECURITY AND CONFIDENTIALITY

You must:

- Always treat any personal or any other information provided to you by us as confidential
- Use personal information only for assigned tasks, such as for preparing accounts, allocating and issuing honorifics, medals and certificates for a Provincial Festival or an Appeal
- Protect the security and integrity of personal or any other information provided to you
- Establish suitable procedures to safeguard your files containing personal information



- Do not sell, or pass on personal or any other information received from the Relief Chest Scheme in any format
- Do not reproduce duplicate, copy or otherwise exploit personal or any other information for commercial purposes
- Inform the Relief Chest Scheme immediately if you are no longer the Relief Chest Representative as you no longer have the right to such information

### ONLINE SERVICES

For the Relief Chest Representatives who have been provided with online access to

- Relief Chest online system
- Reporting system

The Relief Chest Scheme reserves the right to allow or restrict access by the Relief Chest Representatives to Relief Chest System online or to the online Charity Reporting system.

You must:

- Not disclose your password to any other person. If you believe your log in details have been used without your permission, you must notify immediately the Relief Chest Scheme
- Establish suitable electronic procedures to safeguard your computer and storage of personal and other information

### HANDLING PERSONAL INFORMATION

According to the data protection rules, anyone handling personal information must ensure that stringent measures are in place to protect personal information.

If you have been granted access to our new reporting tool **Application EXpress** (APEX) you will be responsible for downloading, segmenting, Interrogating and analysing of personal information to prepare festival performance reports.

The Relief Chest Scheme's Privacy Policy specifies how the Relief Chest Scheme treat personal and other information collected. This Statement of Responsibilities document must be referred to in conjunction with the Relief Chest Scheme's Privacy Policy statement as guidance on how the Relief Chest Scheme manages personal and other collected information.

To obtain a copy of the Relief Chest Scheme Privacy Policy visit

[www.mcf.org.uk/reliefchest](http://www.mcf.org.uk/reliefchest)

or contact us Telephone: 020 3146 3352

Email: [reliefchest@mcf.org.uk](mailto:reliefchest@mcf.org.uk)

Address: Relief Chest Scheme, Masonic Charitable Foundation, 60 Great Queen Street, London WC2B 5AZ

*GDPR/statement of responsibilities/May2018*





# Useful Links

For more information on **Gift Aid**

[hmrc.gov.uk/giftaid](https://hmrc.gov.uk/giftaid)

For information on **Registered Charities**

[charitycommission.gov.uk](https://charitycommission.gov.uk)

For information on **Data Protection Act 2018**

[ico.org.uk](https://ico.org.uk)

## Contacting the Relief Chest Scheme

### Regular Donations

Bridget Gialanze – Regular Donations Coordinator

Tel: 020 3146 3345

Email: [bgialanze@mcf.org.uk](mailto:bgialanze@mcf.org.uk)

### Gift Aid, Miscellaneous, Credit Card & Online Donations

Abiola Nazarete – Donations Coordinator

Tel: 020 3146 3346

Email: [anazarete@mcf.org.uk](mailto:anazarete@mcf.org.uk)

### Gift Aid Envelope Donations

Claire Reeves – Relief Chest Officer

Tel: 020 3146 3347

Email: [creeves@mcf.org.uk](mailto:creeves@mcf.org.uk)

### Donations from Relief Chests (to Charities)

Karon Chatterton – Charity Payments Coordinator

Tel: 020 3146 3348

Email: [kchatterton@mcf.org.uk](mailto:kchatterton@mcf.org.uk)



# General Enquiries/Stationery orders

Office Hours	9.00am - 5.00pm Monday to Thursday 9.00am - 4.00pm Friday
Telephone	020 3146 3352
Address	The Relief Chest Scheme, Masonic Charitable Foundation 60 Great Queen Street, London WC2B 5AZ_
Email	<a href="mailto:reliefchest@mcf.org.uk">reliefchest@mcf.org.uk</a>
Web	<a href="http://mcf.org.uk/reliefchest">mcf.org.uk/reliefchest</a>

July 2020





**Masonic**  
Charitable Foundation

**For Freemasons, for families, for everyone**

60 Great Queen Street | London | WC2B 5AZ | Tel: 020 3146 3333 | [info@mcf.org.uk](mailto:info@mcf.org.uk)  
[www.mcf.org.uk](http://www.mcf.org.uk)

Registered charity number 1164703.

A company limited by guarantee, registered in England and Wales number 09751836.

