

Application for Mandatory / Discretionary Charitable Rate Relief
Under Sections 43 and 47 Local Government Finance Act 1988

(Please read *Mandatory Charitable Rate Relief and Discretionary Rate Relief* guidance notes before completing this form). If you still have problems completing the form please contact the Business Rates section on 01792 635937 / 8.

1. Name of organisation:
2. Is this?
- (a) A claim to be entitled to 80% mandatory reduction of rates under S43(6) of the above Act
- (b) A request for *Discretionary Rate Relief* under S47 of the above act
- (c) A claim for both (a) and (b)

NOTES:

Section 43(6) mandatory relief of 80% applies where the ratepayer is a charity or trustees for a charity and the hereditament* is wholly or mainly used for charitable purposes (whether of that charity or of that and other charities).

Section 47, discretionary relief may apply to:

- (a) Any hereditament falling within Section 43(6) quoted above, up to 20%, in addition to any mandatory relief.
- (b) Any other hereditament which is occupied for the purposes of one or more institutions or other organisations, which are not established or conducted for profit, and whose main objects are charitable, or are otherwise philanthropic, or religious, or concerned with education, social welfare, science, literature or the fine arts, up to 100%.
- (c) Any other hereditament which is occupied for the purposes of a club, society or other organisation, not established or conducted for profit, and is wholly or mainly used for purposes of recreation, up to 100%.

For mandatory or discretionary relief to apply for unoccupied hereditaments, when next in use it must be used for charitable purposes.

*A hereditament is a building or other premises.

3. Requested date from which relief is to commence:
4. Details of premises for which relief is sought:
- (a) Description
- (b) Address:

(c) Business Rates Account Reference (if known):

(d) For what purposes are the premises to be used?

(e) Is membership open to all members of the community? Yes No

(f) Are facilities and the profits made available to people other than members? Yes No

(g) Is membership encouraged from minority groups? Yes No

(h) Does the organisation provide training or education? Yes No

5. Charitable status:

(a) Is the organisation a registered charity? Yes No

(b) If so, please state the charity registration number:

(c) If not, has an application been made for registration Under the provisions of The Charities Act 1960? Yes No

(a) If it is claimed that the organisation is a charity but registration is not necessary, please state why the charity is exempted or excepted from registration.

(e) Is the organisation recognised as a charity for tax purposes? Yes No

6. Please supply:

(a) A copy of the Trust Deed or a print of the written constitution

(b) A copy of the latest set of accounts

(c) A statement giving details of the activities and work carried out at the premises.

7. Contact Details

Please provide the name and address of the secretary or correspondent:

8. I certify that the foregoing statements are correct to the best of my knowledge and belief:

Signature: _____ Date: _____

Capacity in which signed: _____

When completed, this form should be printed and returned to:

The Head of Finance and Delivery
Business Rates Section,
The Civic Centre,
Oystermouth Road,
Swansea
SA1 3SN.

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