

DOWN MASONIC WIDOWS' FUND

Treasurer:-
David Woodrow
8 The Grange
Saintfield
BT24 7NF

Founded



1893

1 The Grange
Lisburn
BT28 3XX
Tel:- 02892665306
Mob:- 07802699061
Email:-
admin@downwidows.org

Application form for New Applicants

Down Masonic Widows Fund

Chairman:- R.W. Bro. Ian Ritchie. PPAGM
www.downwidows.org

Registered with the Charity Commission for Northern Ireland NIC 100079

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November 2018

Notes for completion of New applications.

Due to the introduction of the General Data Protection Regulation (GDPR) details of how we store the information which we hold on our annuitants, how we deal with it and their rights are attached. It is important that this information is given to the applicant and that it is brought to their attention. Please note that they **MUST** sign the Application form to confirm that they have received the privacy statement and explain to them that it needs to be retained by them.

The Application form needs to be completed in full and all details recorded.

Each applicant will be given a permanent unique reference number and this will be used to identify them on all future documents.

Confidentiality is most important. The completed application form and the information contained therein must be treated in the strictest confidence. Forms must not be copied, retained or left where members of the Lodge or the public have access to the information. This would be a breach of GDPR and could have dire consequences on our Fund and repercussions for the Lodge.

Please ensure that no medical details are included as this would not be compliant with the GDPR.

Make sure that the financial income is correctly inserted and that it is weekly and that the correct boxes are completed. An error here can affect the outcome of the application. You need to enquire with the widow as to how her benefits are made up.

If you have any queries, please do not hesitate to contact me for clarification.

Noel Sufferin Secretary.

Chairman:- R.W. Bro. Ian Ritchie. PPAGM
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DOWN MASONIC WIDOWS' FUND

New Application Form for Assistance

<input type="text"/>	District Charity Committee. Lodge No	<input type="text"/>	Ref No:-	<input type="text"/>
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APPLICANT DETAILS (Must be completed in full)

Surname	<input type="text"/>	Tick this box if widow lives on her own	<input type="checkbox"/>
First Names	<input type="text"/>		
Address	<input type="text"/>	Number of dependant children in house	<input type="text"/>
	<input type="text"/>	<u>Housing Type</u>	
Postcode	<input type="text"/>	Own House	<input type="checkbox"/>
Tel No.	<input type="text"/>	Relative's House	<input type="checkbox"/>
Date of Birth	<input type="text"/>	Rented House	<input type="checkbox"/>
		Nursing Home	<input type="checkbox"/>

Details of Masonic Connection

My Husband	<input type="checkbox"/>	Fore names	<input type="text"/>	Surname:-	<input type="text"/>
Brother	<input type="checkbox"/>	Member From:-	<input type="text"/>	To:-	<input type="text"/>
		Date of Death:-	<input type="text"/>	Age:-	<input type="text"/>
		Occupation:-	<input type="text"/>	Lodge No:-	<input type="text"/>

Lodge Almoner / Visiting Brother Details

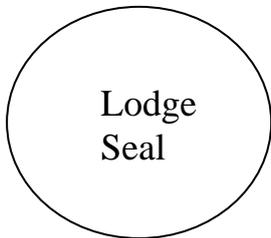
Name: (Print)	<input type="text"/>	Date of Visit:-	<input type="text"/>
Signature:-	<input type="text"/>	Mobile No:-	<input type="text"/>
Email:(Print)	<input type="text"/>	Tel No:-	<input type="text"/>

To be completed by at least **TWO** of the Officers of the Lodge.

We recommend the foregoing application and certify that, to the best of our belief, the information contained within this form is correct.

Signature of Worshipful Master
Signature of Treasurer
Signature of Secretary

<input type="text"/>
<input type="text"/>
<input type="text"/>



Date:-

Secretary's Tel no:-

Secretary's Email:-

Completed form should be sent to the Secretary of
Your District Charity Committee.

To be completed by the District Charity Committee.

Signature of Chairman
Signature of Secretary
Date Recommended by Charity Committee

<input type="text"/>
<input type="text"/>
<input type="text"/>

DOWN MASONIC WIDOWS' FUND

New Application Form for Assistance

<u>WEEKLY INCOME</u>	
Widow's Pension	£
State Pension	£
Occupational Pension	£
Late Husband's Employer Pension	£
Pension Credit	£
Incapacity Benefit / ESA	£
Disability Living Allowance	£
Personal Independent Payment PIP	£
Attendance Allowance	£
Income Support	£
Employment	£
Family Contribution	£
Investment Income	£
Rental Income from land etc	£
Other:-	£
	£
TOTAL <u>WEEKLY</u> INCOME	£

<u>WEEKLY HOUSING COSTS</u>		
Mortgage Repayments <u>per week</u>	£ <input style="width: 100px;" type="text"/>	
Rates Gross	Less Rebate	Net Rates / Week
£ <input style="width: 100px;" type="text"/>	£ <input style="width: 100px;" type="text"/>	£ <input style="width: 100px;" type="text"/>
Rent Gross	Less Rebate	Net Rent / Week
£ <input style="width: 100px;" type="text"/>	£ <input style="width: 100px;" type="text"/>	£ <input style="width: 100px;" type="text"/>
TOTAL <u>WEEKLY</u> EXPENDITURE FOR MORTGAGE, RATES & RENT		£ <input style="width: 100px;" type="text"/>
<p>Please note that details of general expenditure and living costs are not required, only Mortgage, Rates and Rent where applicable.</p>		

APPLICANT'S ASSETS, CAPITAL Etc

Details	Value	Comments
Own Dwelling House	£	
Investments valued at	£	
Current Bank Account	£	
Deposit Account	£	
Post Office Account	£	
Building Society / ISAs	£	
Land or other dwellings	£	For land state acreage.

Should any applicant omit to give a full statement of income from every source, or withhold any information required by this form and the omission subsequently becomes known the grant will be liable to be withdrawn.

The security and privacy of your personal information is important to us. The information given in this form and any supplementary information provided will be stored and processed by DMWF in accordance with the General Data Protection Regulation 2018. Please acknowledge receipt of the "Privacy Statement" attached and confirm that you agree that your information may be used in accordance with the details contained therein.

Signature of Applicant

Date:-

Almoner / visiting Brother's observation on living conditions:- **DO NOT INCLUDE ANY HEALTH DETAILS**

Has widow applied for:-

PENSION CREDIT

YES / NO

RENT / RATE REBATE

YES / NO

Form New11/18

www.downwidows.org

Registered with The Charity Commission for Northern Ireland NIC100079

DOWN MASONIC WIDOWS' FUND

INTRODUCTION

Welcome to the Down Masonic Widows' Fund privacy policy.

Down Masonic Widows' Fund respects your privacy and is committed to protecting your personal data. This privacy policy will inform you as to how we look after your personal data when you apply for financial assistance from the Down Masonic Widows' Fund and tells you about your privacy rights and how the law protects you.

Please also use the Glossary to understand the meaning of some of the terms used in this privacy policy.

1. IMPORTANT INFORMATION AND WHO WE ARE

PURPOSE OF THIS PRIVACY POLICY

This privacy policy aims to give you information on how Down Masonic Widows' Fund collects and processes your personal data which you provide to us when you apply for financial assistance.

It is important that you read this privacy policy together with any other documents we may provide when we are collecting or processing personal data about you so that you are fully aware of how and why we are using your data.

CONTROLLER

Down Masonic Widows' Fund is the controller and responsible for your personal data.

We have appointed a data privacy manager who is responsible for overseeing questions you may have about this privacy policy, including any requests to exercise your legal rights, please contact the data privacy manager using the details set out below.

CONTACT DETAILS

If you have any questions about this privacy policy or our privacy practices, please contact our data privacy manager in the following ways:

Full name of legal entity: Down Masonic Widows Fund

Email address: admin@downwidows.org

Postal address: 1 The Grange, Lisburn, BT28 3XX

Telephone number: 02892 665 306

You have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues (www.ico.org.uk). We would, however, appreciate the chance to deal with your concerns before you approach the ICO so please contact us in the first instance.

CHANGES TO THE PRIVACY POLICY AND YOUR DUTY TO INFORM US OF CHANGES

We keep our privacy policy under regular review. This version was last updated on 01.09.18.

It is important that the personal data we hold about you is accurate and current. Please keep us informed if your personal data changes during your relationship with us.

2. THE DATA WE COLLECT ABOUT YOU

Personal data, or personal information, means any information about an individual from which that person can be identified. It does not include data where the identity has been removed (anonymous data).

We may collect, use, store and transfer different kinds of personal data about you which we have grouped together as follows:

- **"Identity Data"** includes first name, last name, marital status, title, and date of birth.
- **"Contact Data"** includes address and telephone numbers.
- **"Financial Data"** includes bank account details and details of weekly income (such as income from employment or pensions).

We do not collect any **"Special Categories of Personal Data"** about you (this includes details about your race or ethnicity, religious or philosophical beliefs, sex life, sexual orientation, political opinions, trade union membership, information about your health, and genetic and biometric data). Nor do we collect any information about criminal convictions and offences.

IF YOU FAIL TO PROVIDE PERSONAL DATA

Where we need to collect personal data by law, or under the terms of a contract we have with you, and you fail to provide that data when requested, we may not be able to perform the contract we have or are trying to enter into with you (for example, to provide you with financial assistance). In this case, we may have to cancel your financial assistance from us but we will notify you if this is the case at the time.

3. HOW IS YOUR PERSONAL DATA COLLECTED?

We use different methods to collect data from and about you including through:

- **Direct interactions.** You may give us your Identity, Contact and Financial Data by filling in forms or by corresponding with us by post, phone, email or otherwise. This includes personal data you provide when you:
- apply for our support (for example when you fill in the application form);
- give us feedback or contact us.

4. HOW WE USE YOUR PERSONAL DATA

We will only use your personal data when the law allows us to. Most commonly, we will use your personal data in the following circumstances:

- Where we need to perform the contract we are about to enter into or have entered into with you.

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- Where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests.
- Where we need to comply with a legal obligation.

Generally, we do not rely on consent as a legal basis for processing your personal data.

PURPOSES FOR WHICH WE WILL USE YOUR PERSONAL DATA

We have set out below, in a table format, a description of all the ways we plan to use your personal data, and which of the legal bases we rely on to do so. We have also identified what our legitimate interests are where appropriate.

Note that we may process your personal data for more than one lawful ground depending on the specific purpose for which we are using your data. Please contact us if you need details about the specific legal ground we are relying on to process your personal data where more than one ground has been set out in the table below.

Purpose/ Activity	Type of data	Lawful basis for processing including basis of legitimate interest
To register you as an applicant for financial assistance	(a) Identity (b) Contact	Performance of a contract with you
To process your application for financial assistance including: (a) Assess eligibility for financial assistance (b) Consider level of financial assistance payable to you	(a) Identity (b) Contact (c) Financial (d) Transaction (e) Marketing and Communications	(a) Performance of a contract with you (b) Necessary for our legitimate interests (to recover debts due to us)
To manage our relationship with you which	(a) Identity (b) Contact (c) Profile (d) Marketing and Communications	(a) Performance of a contract with you (b) Necessary to comply with a legal obligation (c) Necessary for our legitimate interests (to keep our records updated and to study how customers use our product s/services)

CHANGE OF PURPOSE

We will only use your personal data for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose. If you wish to get an explanation as to how the processing for the new purpose is compatible with the original purpose, please contact our data privacy manager.

If we need to use your personal data for an unrelated purpose, we will notify you and we will explain the legal basis which allows us to do so.

Please note that we may process your personal data without your knowledge or consent, in compliance with the above rules, where this is required or permitted by law.

5. DISCLOSURES OF YOUR PERSONAL DATA

We may share your personal data with the parties set out below for the purposes set out in the table above.

- Internal Third Parties such as the Trustees within the Down Masonic Widows Fund and the specific lodge which your relative was a member of.
- External Third Parties such as the almoners of the respective lodges.

We require all third parties to respect the security of your personal data and to treat it in accordance with the law. We do not allow our third-party service providers to use your personal data for their own purposes and only permit them to process your personal data for specified purposes and in accordance with our instructions.

6. INTERNATIONAL TRANSFERS

We do not transfer your personal data outside the European Economic Area ("EEA").

7. DATA SECURITY

We have put in place appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition, we limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know. They will only process your personal data on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected personal data breach and will notify you and any applicable regulator of a breach where we are legally required to do so.

8. DATA RETENTION

HOW LONG WILL YOU USE MY PERSONAL DATA FOR?

We will only retain your personal data for **four years** being the present year and three previous years where applicable. We may retain your personal data for a longer period in the event of a complaint or if we reasonably believe there is a prospect of litigation in respect to our relationship with you or in the event we have a legal obligation to hold onto the personal data for longer.

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9. YOUR LEGAL RIGHTS

Under certain circumstances, you have rights under data protection laws in relation to your personal data. These are as follows:-

- Request access to your personal data.
- Request correction of your personal data.
- Request erasure of your personal data.
- Object to processing of your personal data.
- Request restriction of processing your personal data.
- Request transfer of your personal data.
- Right to withdraw consent.

If you wish to exercise any of the rights set out above, please contact our data privacy manager.

NO FEE USUALLY REQUIRED

You will not have to pay a fee to access your personal data (or to exercise any of the other rights). However, we may charge a reasonable fee if your request is clearly unfounded, repetitive or excessive. Alternatively, we could refuse to comply with your request in these circumstances.

WHAT WE MAY NEED FROM YOU

We may need to request specific information from you to help us confirm your identity and ensure your right to access your personal data (or to exercise any of your other rights). This is a security measure to ensure that personal data is not disclosed to any person who has no right to receive it. We may also contact you to ask you for further information in relation to your request to speed up our response.

TIME LIMIT TO RESPOND

We try to respond to all legitimate requests within one month. Occasionally it could take us longer than a month if your request is particularly complex or you have made a number of requests. In this case, we will notify you and keep you updated.

10. GLOSSARY

LAWFUL BASIS

"Legitimate Interest" means the interest of our business in conducting and managing our business to enable us to give you the best service/product and the best and most secure experience. We make sure we consider and balance any potential impact on you (both positive and negative) and your rights before we process your personal data for our legitimate interests. We do not use your personal data for activities where our interests are overridden by the impact on you (unless we have your consent or are otherwise required or permitted to by law). You can obtain further information about how we assess our legitimate interests against any potential impact on you in respect of specific activities by contacting our data privacy manager.

"Performance of Contract" means processing your data where it is necessary for the performance of a contract to which you are a party or to take steps at your request before entering into such a contract.

"Comply with a legal obligation" means processing your personal data where it is necessary for compliance with a legal obligation that we are subject to.

YOUR LEGAL RIGHTS

You have the right to:

"Request access" to your personal data (commonly known as a "data subject access request"). This enables you to receive a copy of the personal data we hold about you and to check that we are lawfully processing it.

"Request correction" of the personal data that we hold about you. This enables you to have any incomplete or inaccurate data we hold about you corrected, though we may need to verify the accuracy of the new data you provide to us.

"Request erasure" of your personal data. This enables you to ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have successfully exercised your right to object to processing (see below), where we may have processed your information unlawfully or where we are required to erase your personal data to comply with local law. Note, however, that we may not always be able to comply with your request of erasure for specific legal reasons which will be notified to you, if applicable, at the time of your request.

"Object to processing" of your personal data where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground as you feel it impacts on your fundamental rights and freedoms. You also have the right to object where we are processing your personal data for direct marketing purposes. In some cases, we may demonstrate that we have compelling legitimate grounds to process your information which override your rights and freedoms.

"Request restriction of processing" of your personal data. This enables you to ask us to suspend the processing of your personal data in the following scenarios: if you want us to establish the data's accuracy; where our use of the data is unlawful but you do not want us to erase it; where you need us to hold the data even if we no longer require it as you need it to establish, exercise or defend legal claims; you have objected to our use of your data but we need to verify whether we have overriding legitimate grounds to use it.

"Request the transfer" of your personal data to you or to a third party. We will provide to you, or a third party you have chosen, your personal data in a structured, commonly used, machine-readable format. Note that this right only applies to automated information which you initially provided consent for us to use or where we used the information to perform a contract with you.

"Withdraw consent at any time" where we are relying on consent to process your personal data. However, this will not affect the lawfulness of any processing carried out before you withdraw your consent. If you withdraw your consent, we may not be able to provide certain products or services to you. We will advise you if this is the case at the time you withdraw your consent.