

Trustee Declaration of Interest Form: Guidance

The following is a template for an annual Trustee’s Declaration of Interests to be used if you have a Trustee Board irrespective of whether you are an incorporated body or an unincorporated association.

How to Use:

You should ensure all of your Trustees complete and sign this every year and that the completed forms are saved securely with your governance documents.

Trustees should also be reminded that it is their responsibility to tell you if anything changes during the course of the year.

The information should be shared with the Chair of the Board so they are mindful of any conflicts of interest that might arise during meetings, although it is the responsibility of the individual trustee to ensure any conflicts they have are noted.

Top Tip: To help with administration you may want to use free, online form software to collate the data (such as Google Forms).

Declaration of Interests Form template:

Trustees of the organisation are required to complete this form on an annual basis to advise of their interests.

The information in this form is used to update the register of interests and to assess possible or actual conflicts of interest that may arise in accordance with our conflicts of interest policy. The completion of this form does not remove the need for Trustees to declare interests to the clerk/ company secretary/ Chief Executive/ General Manager/ Union Director/ Chair of the Board as and when they arise.

Please complete and return the form below to xxxx. Electronic signatures accepted. Where the question has a nil return please indicate so by stating “none” in the answer box.

Category	Please give details of the interest and whether it applies to yourself or, where appropriate, a member of your immediate family, connected persons or some other close personal connection.
Personal Details - Name	
Current employment and any previous employment in which you continue to have a financial interest.	
Appointments (voluntary or otherwise), e.g elected roles, representative roles, other trusteeships, directorships, local authority membership, etc.	



Membership of any student groups at the University, political parties, professional bodies, special interest groups or mutual support organisations.	
Please declare the names, registered address, registered company number (if known) and your status within any: (a) Companies in which you own 20% or more of the issued shares or securities; (b) Businesses you own or partly own (including partnerships, limited companies, sole trader venture or any other type of company).	
Other organisations whose decision – making could affect the Union/ student association’s interests and which could give rise to a conflict of interest	
Gifts or hospitality offered to you by external bodies and whether this was declined or accepted in the last twelve months.	
Do you use any of the organisation’s services? Yes/No	
Detail any contractual relationship you have with the organisation or its subsidiary.	
Please declare, to the best of your knowledge: (a) Any contractual relationship between any close relative with the organisation including the name of the company, date of the contract, the nature of the contract, the type of relationship and value of the contract; (b) If a close relative is an employee of the organisation, or holds a position of authority in the organisation Note: “Close relative” includes, but is not limited to, partner, marital partner, civil partner, parent, sibling, child, grandchild and step-parent/sibling/child who may be expected to influence, or be influenced by yourself.	
Any other conflicts that are not covered by the above.	

To the best of my knowledge, the above information is complete and correct. I undertake to update as necessary the information provided, and to review the accuracy of the information on an annual basis. I give my consent for it to be used for the purposes described in the conflicts of interest policy and for no other purpose.

Signed:

Date: