

Charitable trusts



There are thousands of small charitable trusts across Wales, a significant number of which were set up many years ago and whose original purpose may need updating.

It can be a serious dilemma for trustees who carry the responsibility for a fund but are unable to fulfil its charitable purpose and know that local people could be benefitting so much more.

That is where we can help.

Community Foundation Wales can play a key role when trustees of a trust fund are finding things a struggle. With our expert governance and knowledge of local needs across Wales we are uniquely placed to offer advice and guidance on how best to revive or repurpose trusts.

We can assist you with grant-making or help you to transfer the management of the fund across to us.



Trust transfers

We work closely with the Charity Commission to ensure the smooth transfer of charitable funds across to us, where we can ensure that local communities benefit as was originally intended by the donor and trustees.

The donor or trustees can choose to still be involved with the trust without the burden of financial and legal responsibility. We can maintain the same original charitable purpose and fund name so the original legacy lives on for future generations.

Dormant or unclaimed client funds

Handing over dormant or unclaimed accounts to Community Foundation Wales can transform the balances into assets for communities in Wales. When transferring dormant or unclaimed client funds you can specify a cause, theme or geographical area for grants to be made or allow us to determine where and to whom the money goes.



For more information contact Katy Hales, Manager, Donor Advised Giving by emailing katy@communityfoundationwales.org.uk or calling 02920 379580