



## DONATIONS PROCEDURES

SAIF recommends that the minimum procedure for accepting donations is as follows: -

### DONATIONS RECEIVED IN THE OFFICE OR BRANCH

Any donations received to the office should be recorded as follows: -

- Name of the deceased.
- Charity or beneficiary.
- Amount received (counted with the donor present if possible).
- How donations were received, i.e. cash/cheque.
- Who the donor is.

The donor should be given a receipt if they attend in person. If a donation is received by post it may be wise to send an acknowledgement to the donor as best practice; however, an acknowledgement to the client upon closure of the account would be expected.

### DONATIONS COLLECTED AT THE FUNERAL SERVICE

SAIF recommends the procedure for those collected at funerals is: -

- Donations should be collected in a locked box or sealed container marked with the funeral details on it.
- The donations can either be given to the client at the time of the funeral service or taken back to the funeral home in the locked container.
- If the funeral director takes the donations back to the office, they should be counted with another member of staff present who is, preferably, not a connected person, i.e. spouse, sibling or children.
- Any donations received should be recorded if possible: -
  - Name of the deceased.
  - Charity or beneficiary.
  - Amount received.
  - How donations were received, i.e. cash/cheque.
  - Who the donor is.

*Note: for all scenarios SAIF advises to have a client/charities bank account in which to deposit the monies and from which to issue cheques to the various charities. This keeps the funds separate from business funds.*

### INTERNET DONATION SITES

Internet donations sites (i.e. Memory Giving, Just Giving, Much Loved, etc) handle the administration of donations on your behalf and are, therefore, outside of the scope of this procedure.