

## Section D

## **Tertiary Annual Review Report**

### **Core text to be included in Annual Report forms**

The annual report is an opportunity to reflect on our 'living of the Principles as expressed in our personal rule of life' (TSSF Constitutions). You might also reflect on the vow of profession, your experience in the last year, your previous report (if you have it) and the prospects in the year ahead. Pages G2-3 of the Manual ask helpful questions.

**Having undertaken a review of your vocation, what would you like to report?**

**Looking forward, how can the Order help you to fulfil your profession? Is there anything you can offer the Order?**

**As Tertiaries we fulfil our profession 'in company with' others in our Local Group, Area, and more widely, and undertake to give reasons for any absence from meetings. How full a part have you been able to play in our common life this year?**

**Have you contributed financially to the Order this year, and reviewed how much? YES / NO**

Either bring this form with you to renewals at the Francistide Area meeting or return it beforehand by post or email.

If you cannot attend the meeting please inform your AFG, saying why you will be absent, and how and when you will renew.

## Request for leave of absence

**Name of Tertiary:**

**Name of Area:**

**Date from:**

**Date to:**

**Tertiary's reasons for request** (in brief):

**Record below the agreed conditions for the period of leave.** In particular, will the Tertiary continue to fulfil the Rule (particularly as regards their personal rule of life, annual report and renewal, and attendance at meetings if helpful), or will these be varied in some way or suspended?

**Contact during leave.** The Area Formation Guardian will be in contact when necessary with the Tertiary during their absence. For additional support the Area team may name a fellow Tertiary (or Tertiaries) to be a point of contact, for purposes of practical communication, pastoral support and seeking a way forward.

**Name of additional contact(s):**

Postal mailings and group emails will continue to be sent unless otherwise agreed and noted here.

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**Date of approval by Area team:**

*Signed and dated by:*

**Tertiary making request:**

**Additional contact(s):**

**Area Formation Guardian:**

**Date of ratification of Leave of Absence by Chapter:**

The Link Tertiary must inform the Area Formation Guardian and Provincial Membership Secretary of the name and duration of leave

**Date of final review by Tertiary and Area Formation Guardian:**

**Outcome of review:**

**ORDER OF SERVICE FOR THE RE-ADMISSION OF FORMER TERTIARIES INTO THE THIRD ORDER, THE SOCIETY OF SAINT FRANCIS.**

*This Service may take place at an Area Meeting, at a meeting of a Local Group. It may also take place, exceptionally, when considered appropriate by the Area Team, in a small representative gathering at any time and place.*

*The Officiant may be the Area Minister, or the Local Group Convenor, or whoever else is appointed by the Area Team*

**Officiant** My brothers and sisters, Franciscans seek always to be conformed to the image of our Lord Jesus Christ after the example of St Francis. Living in the world members of the Third Order seek, like him, to make humility, love and joy the pre-eminent notes of their lives. We set before ourselves the three aims of the Society; to spread the knowledge and love of Christ, to promote the way of love and unity with all creation, and to live joyfully a life of simplicity and humble service.  
As our Lord Jesus Christ humbled himself to share our human life, so may we leave self behind, that with him we may be raised by the Glory of God the Father.

*(SILENCE)*

In this spirit will N... who wishes to be re-admitted into our Order please come forward.

**Sponsor** I present to you and to our sisters and brothers N... who wishes to be re-admitted into the Order.

**Officiant** Do you accept the Principles as the vision of community for the Third Order of the Society of St Francis?

**Candidate** I do.

**Officiant** Come Holy Spirit, fill the hearts of your faithful people

**All** *And kindle in them the fire of your love.*

**Officiant** I have been crucified with Christ

**All** *It is no longer I who live, but Christ who lives in me.*

**Officiant** I count everything as loss

**All** *Because of the surpassing worth of knowing Christ Jesus my Lord.*

**Officiant** for His sake, I have suffered the loss of all things.

**All** *That I may gain Christ and be found in Him.*

**Candidate** Recognising my earlier Profession and subsequent departure from the family of the Third Order, I now ask for my re-admission.

**Officiant** My brother/sister N... giving thanks to God for his goodness, and asking for his forgiveness of your and our failures, will you follow Christ in the fellowship of St Francis, be open to the Holy Spirit and dedicate yourself anew to the joyful discipline of our Profession?

**Candidate** I will, the Lord being my helper.

I, N... give myself to our Lord Jesus Christ and make anew my Pledge to serve Him for the rest of my life in company with my brothers and sisters in the Third Order of the Society of St Francis, seeking to promote the spirit of love and harmony as the family of God and to live joyfully a life of simplicity and humble service after the example of St Francis.

I, N... undertake by God's grace to keep for one year my Personal Rule of Life (which I now place upon the altar).

**Officiant** N... on behalf of the Third Order of the Society of St Francis, I welcome you back, as a Tertiary, into our Order and fellowship. May the Lord accept your offering and give you grace to persevere with joy.

**All**        *Almighty God  
Forgive what we have been,  
bless what we are,  
and direct what we shall be  
through Jesus Christ our Lord, Amen.*

**The THIRD ORDER of the SOCIETY OF SAINT FRANCIS**  
**NOMINATION FORM FOR OFFICE HOLDER**

**Title of**

**Role**.....

The **Candidate's** name.....

Address.....

.....

.....

.....

Postcode.....

Telephone No.....Mobile.....

E-mail

address.....

Signed (**the Proposer**).....

Proposer's full name.....

Telephone Number.....

E-mail

address.....

Signed (**the Seconder**).....

Seconder full name.....

Telephone number.....

E-mail

address.....

Declaration by the candidate:

I agree to serve as.....for an initial period of three  
years if duly elected.

Signed (**the Candidate**).....

Date.....

**The THIRD ORDER of the SOCIETY OF SAINT FRANCIS  
ELECTION FORM FOR AREA OFFICE HOLDER**

**Title of Area Role**.....

Voters must be a professed Tertiary within the Area (see TSSF Manual: Statutes:- F-5).

**All professed Tertiaries are strongly encouraged to vote.**

I vote for the following professed Tertiary for election to the office of ..... (please put a cross in a box for one candidate only and sign and date the form below):

**Name of Candidate**.....

(Candidate's Tel No.....)

(Proposer's Name & Tel No.....)

(Secunder's name & Tel No.....)

**Name of Candidate**.....

(Candidate's Tel No.....)

Proposer's Name & Tel No.....)

Secunder's Name & Tel No.....)

***Details of the elector***

(please use capitals, except for signatures)

Signature.....

Full Name.....

Address.....

.....

Telephone No.....

E-mail address.....

***NB. To be valid, this page of the voting form must be returned to the election organiser (address and details.....)***

***By No later than***.....

## Giving a Bequest - wording and notes

### **Pecuniary**

I GIVE (free of tax) the sum of £000000 (amount in words) to  
THE THIRD ORDER OF THE SOCIETY OF ST FRANCIS (charity No 1064356) c/o Lower Stonehouse  
Farm Brown Edge Stoke on Trent Staffordshire ST6 8TF

OR

### **Residue**

MY TRUSTEES shall hold my Residuary Estate ON TRUST to divide and pay the same  
as follows:

- a) as to 0% thereof for THE THIRD ORDER OF THE SOCIETY OF ST FRANCIS (charity no. 1064356)  
c/o Lower Stonehouse Farm Brown Edge Stoke on Trent Staffordshire ST6 8TF
- b) Second Charity etc....

### **Wish or specific condition or general**

*I DECLARE that any legacy or payment made to a charitable organisation under  
this my Will shall be for its general charitable purposes*

### **Precautionary clause**

and I DIRECT that in

respect of the legacy or payment the receipt of a person who appears to be  
treasurer or other proper officer of the relevant organisation shall be a sufficient  
discharge to my Trustees and I FURTHER DIRECT that if at the date the legacy  
vests or the payment is due any organisation has ceased to exist or amalgamated  
with another charity or has changed its name ("the Defunct Charity") my  
Trustees shall pay the relevant legacy or entitlement to the charitable  
organisation which in their discretion consider most nearly fulfils the objects of

the Defunct Charity



## **General Notes**

**It is recommended if you wish to leave a Legacy to Charity in your will that such a clause should be drawn up by a solicitor who will advise you of the different ways of doing so in accordance with your wishes.**

The basic information the solicitor will require is the exact name of the charity and its charity number and contact address.

Legacies can be pecuniary. This is to say you are leaving a specific sum of money to the charity.

Legacies can be taken out of the Residuary Estate. This is to say the amount left after all other bequests and conditions have been met. This can be a specific sum or a percentage of the remaining balance. Percentages can have a considerable advantage as often we do not know what the residue will actually be and to specify a sum can be problematic in so far as there may not be sufficient to meet the bequest.

Your legacy should be specified as to what you intend the charity to do with it. The example shown allows the charity to spend the bequest as they see fit.

Solicitors urge care in making a binding condition as this may turn out to be inappropriate. See the explanation below.

### **Sometimes donors ask if they can leave a legacy to our charity for one of our charity's specific projects or activities. Is this possible?**

Yes. There are two main ways that they can do this, either by making a gift subject to an expression of wish or making a gift subject to binding obligations as to its use.

#### **Expression of wish?**

What this means is that donors can request or express a wish, usually in their will, that your charity use their legacy for a particular purpose. For example, a donor may leave a legacy to an overseas aid charity and request that it be used in a particular country. Although your charity is not legally obliged to use the legacy in accordance with the donor's wishes, your charity will be under a moral obligation to try to comply if able to do so. The advantage of this type of legacy is that it gives flexibility in case the activities/projects of your charity change between the date of the will and the date of death (when the legacy takes effect) so your charity can take account of any changing circumstances.

#### **What about gifts subject to binding obligations?**

Donors can leave a legacy to your charity and state, in their will, that the legacy must be used for a particular purpose. For example, an educational charity might be given a legacy which must be used to fund an annual scholarship in the name of the donor. Or a religious charity might be left a sum to a specific fund which must be used for a specific cause. This type of legacy must be used for the purpose for which it is given.

## Third Order of the Society of St. Francis (European Province)

### HMRC GIFT AID DECLARATION FORM

I want to Gift Aid any donations I have made in the past 4 years or I make in the future to The Third Order of the Society of St. Francis.

I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.

Title (Rev, Mrs, Ms, Mr, Dr etc)

First name or initial(s)

Surname

Full home address

Post Code

Date

Please notify the charity if you:

- Want to cancel this declaration
- Change your name or home address
- No longer pay sufficient tax on your income and/or capital gains

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self Assessment tax return or ask HM Revenue and Customs to adjust your tax code.

**There is now no need to sign the form (unless you want to!)**

Please return by email to [treasurer@tssf.org.uk](mailto:treasurer@tssf.org.uk)

or by post to: John Lovatt, Provincial Treasurer TSSF, Lower Stonehouse Farm, Brown Edge, Stoke on Trent, ST6 8TF.

Tel: 01782 503090

Thank you

**Third Order of the Society of St. Francis (European Province)**

**BANK STANDING ORDER FORM**

**To:** (Bank/Building Society).....  
Branch Address  
(PLEASE PRINT).....  
.....Post Code .....

**Please pay to:** THE THIRD ORDER OF ST. FRANCIS, The Co-operative Bank  
P.O.Box 250, Delf House, Southway, Skelmersdale WN8 6WT;  
Sort Code 08-92-99; Account No. 65622601

<b>Quote ID</b>	(to be completed by the Society)
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Beginning immediately, and then until further notice

**Every month three months six months year** (Delete as appropriate)

the amount of: £.....(words.....pounds)

This cancels any existing Standing Order in my name payable to  
The Third Order of the Society of St. Francis.

My full name (BLOCK LETTERS).....

My Address.....

My Account Number .....Sort Code.....

Signature.....Date of Signing.....

**Please use the new Gift Aid Declaration Form attached if you wish to Gift Aid  
your contribution or any other offering to the Order.**



THE THIRD ORDER OF THE SOCIETY OF ST. FRANCIS  
European Province

INCOME AND EXPENDITURE RETURN

AREA NAME |

CLUSTER  
NAME

PERIOD COVERED BY THIS RETURN

		£
<b>Balance brought forward</b>	Cash	
	Bank	
Less cheques uncleared from	- see details below	
	<b>Total (A)</b>	
<b>Income</b>		
Amount received from Province		
Area Meeting collections		
Other monies received (specify)		
Hillfield Weekend		
Quiet Day		
2014 Area		
Retreat		
	<b>TOTAL (C)=A+B</b>	
<b>Expenditure</b>		
Travel Expenses		
-----Photocopying/Statinery/Postage		
Telephone		
Cost of Area Meetings - Venue		
Cost of Area Meetings - Visitors		
Purchase of Formation/Training Material		
Cluster Expenses		
Other Expenses (please specify)		
Quiet Day 2014		
Area Retreat 2015		
Area Meeting refreshments		
<b>Total Expenditure</b>	<b>D</b>	
<b>Balance</b>	<b>E = (C - D)</b>	
<b>Balance carried forward</b>	Cash	
	Bank	
	<b>Total (should = E)</b>	

Notes Car mileage is reclaimable at 40p per mile  
 Please return after 31st May. Deadline 30th June 2015

See NOTE over for explanation of balances

