

DONATION PROCESSING POLICY

AIMS

- At A Abbott & Sons we wish to provide a donation collection service for the bereaved. We agree that we should be able to accept credit/debit cards, cheques and cash—we do not accept foreign currencies or crypto
- We offer the bereaved up to two different charities.

HOW

- Cheques to be accepted via office visits, deposits at funeral service and via the post.
- Credit/Debit cards to be accepted via a recognised third party currently Love2Donate. No card payments are to be taken via A Abbott & Sons business accounts
- Cash to be accepted via office visits, deposits at funeral services and occasionally via the post.

RECORDS

- A Abbott & Sons will maintain a strict list of donations received.
- Names of the donors
- Amounts
- Type of payment received
- Choice of charity
- Date of processing the payment to the charity
- Method of processing the payment to the charity

SECURITY

- Donation boxes must be used at funeral services.
- Donation boxes must be returned to the office immediately after a funeral by two members of staff.
- Donation boxes will be emptied and contents recorded on the same day of receipt.
- Cash and cheque donations to be recorded on the same day of receipt.
- All donations are to be placed to our secure locked donation drawer or to the locked donation cash tin.
- Credit/Debit card transactions to be handled by our third party provider—currently Love2Donate.

PROCESSING PAYMENT TO CHARITY

- Take in the totals from Love2Donate and generate letters to the client and to the charities.
- Records of the date of processing and letters must be maintained.
- Card, cash and cheque deposits must be balanced before sending off to the charities.
- The cash and cheques must be banked and cleared into the clients/donation account before sending the payments to the charity.

AUDIT

- Every month the balance of the clients/donation account must be balanced to ensure there are no processing errors.
- Every month to check to see if any cheques issued have not been banked by the nominated charity.
- Chase up charity as necessary to see monies are delivered to the charity.
- If this cannot be achieved then contact the funeral applicant for further instructions.
- Annually the account is presented to Jervis & Partners for balance checking.

COMPLAINTS

- Any complaints must be dealt with in accordance with our general complaints policy.
- Management must be informed immediately should any disputes arise.