

Application



TRUST WAIKATO
TE PUNA O WAIKATO

Supporting and enhancing the
greater Waikato community

Te Puna o Waikato

*E tautoko ana, e āwhina ana
i te hira tangata o Waikato whānui*

2010 Donation Application

Trust Waikato helps organisations carry out charitable, cultural, philanthropic and recreational work which is of benefit to people in the greater Waikato area, including Coromandel, Hauraki Plains, Matamata, Ohinemuri, Otorohanga, Piako, Raglan, Taumarunui, Thames, Waikato, Waipa, Waitomo and all cities and towns in these areas.

Organisation Name.....

.....
.....

Location where your organisation operates

.....
.....

Project applied for.....

.....
.....

Amount applied for \$.....

If you want to download
this form on your computer visit
www.trustwaikato.co.nz
for details.

Applications close:

19 February 2010 | 11 June 2010 | 17 September 2010

Your postcode is really important.

1 **Organisation or Group**.....

2 **Postal Address** Street..... PO Box.....
Town..... Postcode.....
Phone.....
Email.....

3 **Contact Person**

Please identify an appropriate person who can be contacted by Trust Waikato, regarding your application.

Name..... Position.....
Phone (Day)..... (Evening).....
Email.....

4 **Name of Principal Officers**

Name..... Position..... Phone (Day).....
Name..... Position..... Phone (Day).....
Name..... Position..... Phone (Day).....

5 **State your Organisation's Purpose and Objectives**.....

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.....

6 **Legal Status**

Are you a Trust, Incorporated Society or other? If other please specify.

Trust Incorporated Society Other.....

How long has your organisation or branch been in existence?.....

If your organisation is responsible to, or controlled by, any other organisation please state

7 **Tax Status**

Tick which category your organisation falls into.

- Our organisation is registered with the Charities Commission. Our number is
- Our organisation holds a current **letter** from Inland Revenue which grants tax exempt status and a copy of this letter is attached.
- Our organisation does not hold a letter from Inland Revenue granting tax exempt status.

Note: A Certificate of Exemption from Resident Withholding Tax on interest and dividends or a Certificate of Exemption from Interest and Dividend PAYE (IR15c) does not mean that you have tax exempt status.

8 **Services / Programmes**

What services or programmes do you currently provide?.....
.....
.....

9 **Staff / Volunteers**

Number of paid staff (full-time equivalents)..... Number of volunteers.....

What do your volunteers do?.....
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10 **Membership**

'Asian' includes people with, for example, Chinese, Japanese, Korean, Malaysian or Indian cultural affiliations.

Number of members (e.g. pupils) if applicable.....

Number of people helped last year (e.g. clients) if applicable.....

The table below lists the main ethnic groups in the Waikato. Estimate the number of members and/or clients you serve.

	NZ European	Māori	Pacific Island	Asian	Other Ethnic	Don't know	Total
Members							
Clients							

11 **Accountability**

If you received a Trust Waikato donation in 2009, please detail what it was for, how it was spent and the benefit to the community. Attach receipts, annual accounts, reports, photographs, etc.

Amount received \$.....

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Your accountability should be relative to the size of your donation.

12 **Donation Request**

What are you seeking this donation for? Additional details may be attached for new or major projects, e.g. feasibility studies, business plans, budgets, quotes.

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13 **Community Benefit**

What will the benefit of your project be? Who will benefit? How many people? How will they benefit?

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.....

The Trust wishes to support positive projects and programmes in Māori communities.

Does your group identify as Māori? YES NO

14 **Your Income**

What are your usual sources of funds?.....

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21 Attachments

The following information needs to be attached to this application

Enclosed

- 1. A copy of latest bank statement for each account
- 2. The most recent financial statements (with audit report, if audited)
- 3. The Chairperson's Report from the last Annual General Meeting
- 4. Copies of reports/receipts regarding Trust Waikato previous donation
- 5. Printed bank deposit slip for the account to be credited
- 6. Multi-year Donation Application (if applying)

Do not send your constitution or trust deed.

22 Group and Personal Information (Privacy Act 1993, Unsolicited Electronic Messages Act 2007)

Note: Groups and individuals have the right to check and correct any personal information held by Trust Waikato.

- 1. Group and personal information collected will be held by the Trust for the purpose of assessing applications and may be shared with other parties in the process of assessing the application or in publishing the results of approved donations.
- 2. Please tick to show that either you agree or disagree with your group and personal information being used for the following purposes

Agree Disagree

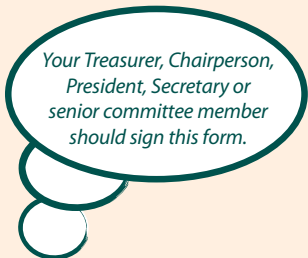
- for subsequent mailing (postal or electronic mail) of Trust Waikato information to me and/or my group,
- to be used for research purposes as approved by the Trust Privacy Officer,
- to be sent information on behalf of other agencies which, in the opinion of the Privacy Officer, is relevant to the group.

- 3. The full Privacy Policy is set out on the Trust's website – www.trustwaikato.co.nz.

23 Declaration

In making this donation application I declare that

- 1. I am authorised to do so and to the best of my knowledge the information contained herein is true and correct.**
- 2. Any donation received will be used for the project for which it was approved.**
- 3. The organisation will comply with any reasonable request from Trust Waikato to monitor performance and accountability.**



For and on behalf of our organisation

Full name of organisation.....

Signature..... Full Name.....

Position.....

Witness..... Full Name.....

Date.....

You need to know

- You can access this form at www.trustwaikato.co.nz. Save this form to your hard drive, type your answers directly into it, print it out, sign it and either post or deliver the paper form by the closing date.
- Organisations/groups can generally only receive one donation in each calendar year.
- For further information about donations and our complete donation policy, visit www.trustwaikato.co.nz.

Have you answered all the questions and signed the application?

Please return this application form by 4.30pm on:

19 February 2010 | 11 June 2010 | 17 September 2010

The Chief Executive, Trust Waikato (Inc), PO Box 391, Hamilton 3240 or hand deliver to 2 London Street, Hamilton.

Email, faxed and late applications will not be considered.

Note: If you have any queries concerning this application call us on 07 838 2660 or freephone 0800 436 628.

Alternatively you can email twinfo@trustwaikato.co.nz.

Trust Waikato Use Only

	Yes	No
1. Application received on time	<input type="radio"/>	<input type="radio"/>
2. Complies with Donation Policy	<input type="radio"/>	<input type="radio"/>
3. Bank statements included	<input type="radio"/>	<input type="radio"/>
4. Bank deposit slip	<input type="radio"/>	<input type="radio"/>
5. Most recent financial statements included	<input type="radio"/>	<input type="radio"/>
6. Chairperson's report included	<input type="radio"/>	<input type="radio"/>
7. Accountability requirements met	<input type="radio"/>	<input type="radio"/>
8. Multi-year donation application	<input type="radio"/>	<input type="radio"/>

Description for.....

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Notes.....

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Recommendation.....

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