This form is now interactive and can be filled out on-line and then printed.

Or it can be printed and completed normally using a pen.

FOUR REGIONS TRUST

Rangitikei · Ruapehu · South Taranaki · Whanganui

FORMERLY POWERCO WANGANUI TRUST

DONATION APPLICATION FORM & APPLICATION GUIDELINES

Updated May 2017

For more information contact the Four Regions Trust Secretary:

Secretary – Moore Stephens Markhams Wanganui
249 Wicksteed Street | PO Box 4088 | Whanganui 4541 | NZ.

phone 06 349 0888 | **email** secretary@fourregionstrust.org.nz | **web** www.fourregionstrust.org.nz

FOUR REGIONS TRUST

Rangitikei · Ruapehu · South Taranaki · Whanganui

FORMERLY POWERCO WANGANUI TRUST

ABOUT THE TRUST

WHAT IS THE FOUR REGIONS TRUST?

The Four Regions Trust (formerly known as the Powerco Wanganui Trust) was formed in 1993 to distribute profits from the trusts investments.

Currently the trust has approximately $32 million invested and its goal is to donate around $1.0 million per year into its local area. The trust is managed by seven locally appointed trustees.

Administration of the trust is handled by the trust secretary.

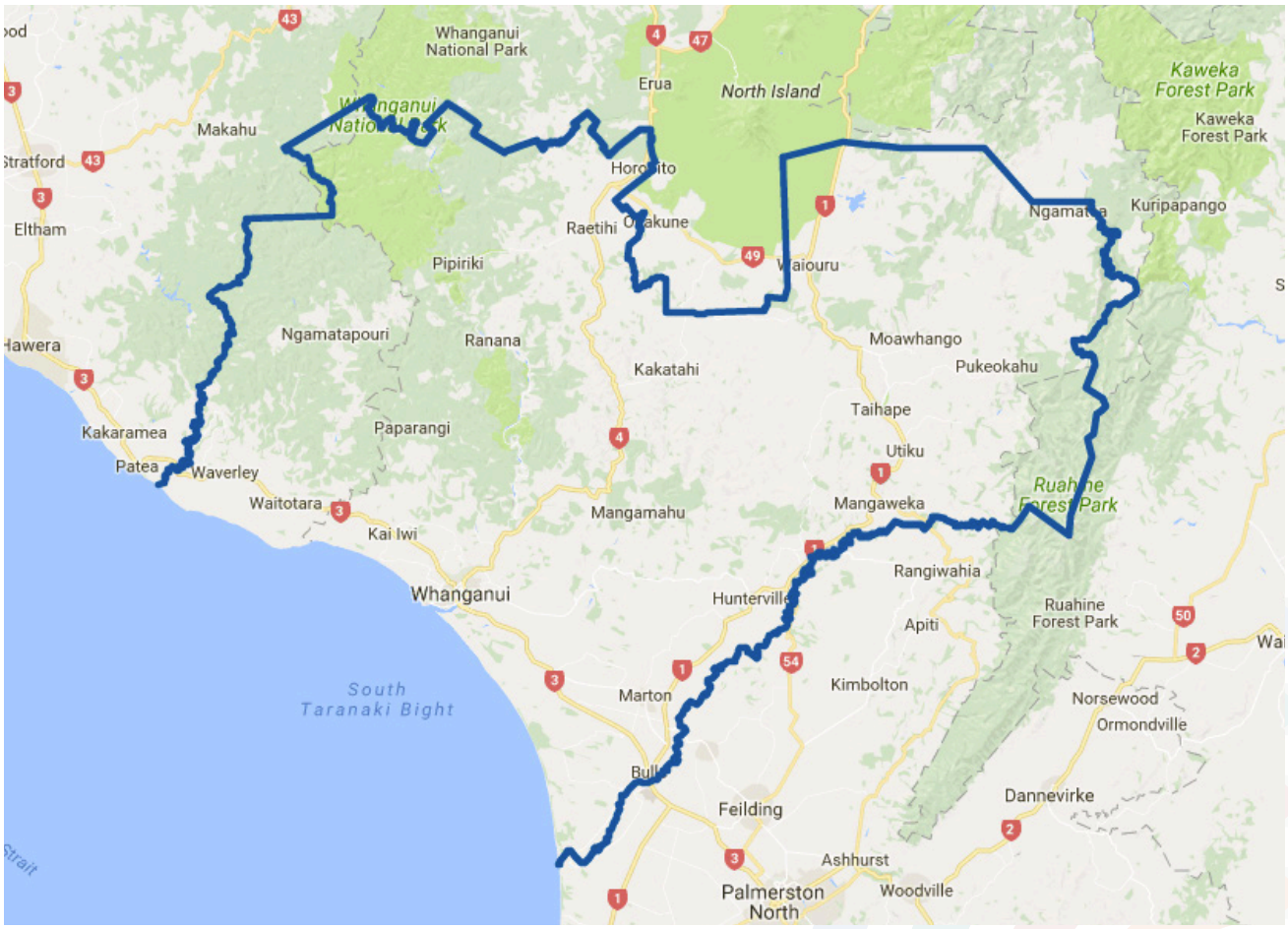
WHAT ARE THE TRUSTS BOUNDARIES?

The Four Regions Trust covers the geographical area of the former Wanganui Rangitikei Electric Power Board, comprising Wanganui, Rangitikei, Waverley and Waimarino, excluding Ohakune.

WHO CAN APPLY?

Applications will only be considered from organisations that are primarily charitable in nature and provide services that will benefit the general public either directly or indirectly within the trust's boundaries. This may include:

- Organisations providing care, training or advice for youth, the elderly, the disabled or the disadvantaged
- Sports associations benefiting their sports area will be preferred over individual sports clubs
- Applications from schools for educational and training equipment will be preferred over sports equipment



APPLICATION GUIDELINES

The answers below are guidelines only, and do not bind or commit the trustees in the consideration of applications. Capping levels on funding technology are subject to change without notice.

WHAT CAN BE APPLIED FOR?

Applications for funds must provide clear benefits to the local community and be seen as providing a significant community development within the local area. Ideally applications will be for physical items and projects necessary in achieving the organisation's charitable purpose.

CAN COMPUTERS AND OTHER TECHNOLOGY BE APPLIED FOR?

Applications for computers, laptops, photocopiers, iPads, classroom electronics and other new technologies are acceptable. In most cases a cap has been set on the maximum donation and is reviewed on a regular basis.

As from November 2014 the current limits for Electronic Equipment include:

- Computers/Laptops - $1,000
- Ipads/Tablets - $500
- Photocopiers - $2,000
- Heat Pumps - 50% of the cost, up to a maximum of $2,000
- Electronic Teaching Aids - 50%

CAN ELECTRICITY / ENERGY SAVING PROJECTS BE APPLIED FOR?

Traditionally applications for projects involving the use and / or more efficient use of electricity or energy resources have been considered favourably. For heat pumps, if the application is approved, the trust will normally pay 50% of the cost, up to a maximum of $2000.

WHAT SHOULD NOT BE APPLIED FOR?

While all applications will be considered for operational costs, overheads or running expenses (such as wages, rent travel, leave costs, conferences costs etc.) will not normally be approved.

WHEN CAN APPLICATIONS BE MADE?

- Applications can be made at any time and are considered three times a year
- Closing dates for each round are: 28 February, 30 June 31 October
- The outcome of most applications will be advised within six weeks following the closing date.
- Two copies of the application and all supporting data are required when applying.
- Please make sure all pages in your application form are single-sided.
- All information must be received by the closing date as they are circulated to trustees prior the meeting.
- Incomplete or late applications will not be considered.

WHEN WILL APPLICATIONS BE PAID OUT?

- Approved applications will be paid out when appropriate receipts / documentation received confirming the project and expenditure has been undertaken.
- Applications funds must be uplifted within 12 months of approval or donation offer will be withdrawn.
- A 12 month extension will be considered upon written request to the trust giving reasons for the delay.
- It is the organisations responsibility to uplift funds within the time frame or advise the trust secretary of the delay.

FOR MORE INFORMATION CONTACT THE FOUR REGIONS TRUST SECRETARY:

SECRETARY – MOORE STEPHENS MARKHAMS WANGANUI

address 249 Wicksteed Street | PO Box 4088 | Whanganui 4541 | NZ.
phone 06 349 0888
email secretary@fourregionstrust.org.nz
web www.fourregionstrust.org.nz

FOUR REGIONS TRUST APPLICATION FORM

All parts of this application must be completed. An incomplete section may result in your application not being considered. It is the applicants responsibility to ensure all data is provided.

Part One: Organisation Details

Date of application: / /

Full Name of Organisation: .....

Postal Address of Organisation: .....

Organisation Bank Account No:: .....

Charities Reg. No. (*if applicable*): .....

Chairperson/President: .....

Secretary: .....

Treasurer: .....

Names of Trustees/Board/: .....

Committee Members .....

.....

.....

Organisation Status:
- ☐ Incorporated Society
- ☐ Unincorporated Society/Club
- ☐ Charitable Trust
- ☐ School
- ☐ Other: .....

No. of members in organisation: .....

No. of unpaid staff: .....

No. of paid staff: .....

Briefly describe the aims and purpose of your organisation:

.....

.....

.....

When was the organisation formed: .....

Part Two: Contact for this Application

Name of Contact: .....

Position within the organisation: .....

Address for Correspondence: .....

Contact Phone Number: .....

Email Address: .....

Part Three: About this Application

Please **summarise** the project for which this application is made.

Separate sheets can be provided to give us fuller details of the project, but this should not be necessary

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.....

.....

Describe how project will benefit the community:

.....

.....

What is the project timeframe for this application? .....

Who will own and/or administer any asset created by this project? .....

Part Four: Application Project Costs

Total cost of project applied for: $ .....

GST inclusive ☐ Yes ☐ No

Donation sought in this Application: $ .....

Funds already raised: $ .....

Donations sought from other trusts: $ .....

Shortfall (if any): $ .....

Please summarise how will the shortfall be raised? **If no contribution is being made**, please explain why.

.....

.....

Are you GST registered: ☐ Yes ☐ No

GST number: (*if registered*) ..... IRD number: .....

Are your latest audited and signed financial statements and/or annual report attached.

☐ Yes ☐ No If No, please explain why:.....

QUOTE SUMMARY *(two quotes must be attached for all requested amounts. Please summarise the quote values below. If the quotes are not provided, please explain why.)*

.....

.....

Name of Supplier: ..... Quote Value: .....

Name of Supplier: ..... Quote Value: .....

Name of Supplier: ..... Quote Value: .....

Name of Supplier: ..... Quote Value: .....

Part Five: Declaration & Privacy Act 1993 Authorisation

This declaration relates to the current application being made and the information the Four Regions Trust may hold on your organisation now and in the future.

(Please tick each box to acknowledge you understand)

- ☐ I/we hereby declare that I/we are authorised to submit this application and that any donation received will be used for the project for which it was approved.
- ☐ I/we authorise the Four Regions Trust to use this information for the process and approval of this application.
- ☐ I/we authorise Four Regions Trust to seek any information they may require to consider this application.
- ☐ I/we hereby declare that the information provided is correct.
- ☐ I/we acknowledge that any decision made by Four Regions Trust is final.
- ☐ I/we agree to abide by any conditions that the Four Regions Trust may apply to the approved donation.
- ☐ I/we hereby declare that the enclosed accounts are accurate and are the most up to date set of annual financial statements available at the time of submitting this application.

Name of Applicant (print clearly): .....

Signature of Applicant: .....

Date: .....

Name of Chairperson/President: .....

Signature of Chairperson/President: .....

Date: .....

Have you completed all parts of this application?

Please tick the boxes below to acknowledge all sections are completed and all additional information is attached?

Section One: ☐ Organisational Information

Section Two: ☐ Organisational Contact

Section Three: ☐ About This Application

Section Four: ☐ Financial Costs of the Project

Section Five: ☐ Signature of **TWO** People

Most recent set of **SIGNED** Annual Accounts: ☐

Verification of bank account number: ☐
(Can be Deposit Slip or Bank Statement)

Quotes for work to be completed: ☐

Optional additional information: ☐

PLEASE NOTE: You must provide **TWO** copies of this application and ALL supporting documents at the time of application. The Trust will not consider incomplete applications or application received after the closing date.

For more information, contact the Four Regions Trust Secretary
Moore Stephens Markhams Wanganui
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Office Use Only:

Annual Accounts Received ☐ Deposit Slip Received ☐ Quotes Received ☐ Declaration Completed ☐