

St Joans Trust Application Guidelines

Charity Registration Number CC25178

The Objectives of the Trust

The St Joans Trust is The Trust Deed for the St Joans Trust dated the 1st August 2007 defines the purpose of the Trust as follows:

to promote the care, maintenance, welfare and rehabilitation of elderly persons and to promote stimulation and encourage public interest in the total welfare and health care of elderly persons.

The purpose of the Trust is achieved by the Trustee making grants (by way of lump sum as a one-off payment) to charitable organisations registered under the Charities Act 2005.

Application for Grants

To apply for a grant from the St Joans Trust please complete an application form which can be downloaded at www.trustees.co.nz. Alternatively you can request an application form by email, contact: jacqui.shephard@trustees.co.nz or call **0800 Trustees (0800 878 783)**.

Where possible, please save the application form and complete on screen, print out, sign and send in with all relevant documents.

The information required on the application form includes:

- Rules of the organisation
- Copy of Charities Commission Certificate of Registration
- The reason(s) a grant is required
- The amount of funds required
- Details of the total cost of the proposed project and other financial sources to help fund the project
- A copy of the latest Annual Report and Financial Statement
- Authority for Trustees Executors Limited as trustee of the St Joans Trust to obtain further information from third parties
- A signed copy of these guidelines

Please Note the Following:

- Grants may be made to assist individuals through sponsoring charitable organisations.
- Grants can only be applied in New Zealand.
- Grants must be used for the purpose for which they are given. The Trustee requires the recipient of a grant to complete an evaluation form and return it to the Trustee declaring that the funds have been used for the purposes for which they are given.
- All areas of the application forms must be completed correctly. Application forms not completed to the required standard will not be considered.
- Applications postmarked after the closing date for applications will not be considered.
- Trustees Executors Limited will acknowledge receipt of the application form within 5 working days after the closing date.
- Once a decision has been made to decline an application no further correspondence will be entered into.
- The Trustee may approve an amount less than that applied for.
- Payment of a grant is usually within two weeks of the Trustee indicating its approval of that grant, provided all conditions are met.
- Please forward five sets of the required information outlined on the application form (please note that only one copy of a pre-printed bank deposit slip is required).

Timeframe for the Processing of Applications for Grants

All completed application forms and accompanying documentation must be received by Trustees Executors Limited no later than the closing date shown below (faxed applications are not accepted).

No application forms post marked after the closing date will be considered.

Please post **five** copies of **both** the application form and accompanying documentation to:

St Joans Trust
Trustees Executors Limited
PO Box 566
Christchurch 8140

Or deliver to:

St Joans Trust
Trustees Executors Limited
Level 5, PriceWaterhouseCoopers Centre
119 Armagh Street
Christchurch

Closing Date for Application

15 September 2010

Trustees Executors Limited Officers meet

Mid October 2010

I/We the applicant(s) confirm that I/We have read and accept these application guidelines.

----- Signature	----- Position	----- Date
----- Signature	----- Position	----- Date



Trustees Executors Limited *Financial Protection since 1881*