

# Estate of Kathleen Alice Boyd

## Application Guidelines

Charity Registration Number CC10261

### Objectives of the Trust

The Will for Kathleen Alice Boyd dated the 18th December 1987 defines the objectives of the Trust as follows:

***“For charitable purposes within New Zealand”.***

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 Estate of Kathleen Alice Boyd please complete an application form which can be downloaded at [www.trustees.co.nz](http://www.trustees.co.nz). Alternatively you can request an application form by email, contact: [sue.addison@trustees.co.nz](mailto:sue.addison@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 or founding document(s)
- Copy of Charities Commission Certificate of Registration or evidence 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
- A signed copy of these guidelines and an **original** pre-printed bank deposit slip
- Authority for the Estate of Kathleen Alice Boyd to obtain further information from third parties (if applicable).

### Please Note the Following

1. Due to the size of this trust, only applications for grant requests up to a maximum of \$2,000 will be considered.
2. The Trustee may approve an amount less than that applied for.
3. Applications for specific projects have historically received a higher weighting than those for salaries or administration costs
4. Grants may be made to assist individuals through sponsoring charitable organisations (applications direct from individuals will not be considered).
5. All areas of the application forms must be completed correctly. Application forms not completed to the required standard will not be considered.
6. TEL will acknowledge receipt of the application form via email within 20 working days after the closing date. All further correspondence will be via email.
7. Applications postmarked after the closing date will not be considered.
8. Once a decision has been made to decline an application no further correspondence will be entered into.
9. Payment of a grant is usually within four weeks of the Trustees indicating their approval of that grant, providing all conditions are met.
10. Please forward **one** set of the required information outlined on the application form..

### Information on Previous Years

In recent years 8-11 grants have been approved annually to eligible recipients. The values of individual grants have ranged from \$250-\$2,500.

### 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 (faxed or emailed applications are not accepted).

**No application forms post marked after the closing date will be considered. Grants can only be applied in New Zealand.**

Please **post one** set of the application form and accompanying documentation to:

Estate of Kathleen Alice Boyd  
Trustees Executors Limited  
PO Box 14076  
Christchurch 8544

OR courier to:

Trustees Executors Limited  
32C Sheffield Crescent  
Burnside  
Christchurch

**Applications Open: 3 January each year**

**Application Close: 1 March each year**

**Advisory Trustees Meet: March/April following close of applications**

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

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Signature

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Position

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Date

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Signature

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Position

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Date