



## THE FELTON BEQUESTS' COMMITTEE

Level 4, 100 Queen Street, Melbourne Victoria 3000

Postal Address The Secretary, The Felton Bequests' Committee  
C/- ANZ Trustees Limited  
GPO Box 389 Melbourne Victoria 3001

Telephone +61 3 9273 6799

Facsimile +61 3 9273 6354

*Application form:  
Small Grants (Closing date: 1 April each year)  
(Please limit your submission to one (1) A4 page only)*

**You must provide the original and one copy of the full application**

The information you need to provide with your application is detailed below and on the following pages. Applications must provide the information, including required attachments, in order to be considered.

Name of Organisation:

ABN number:

Postal Address:

Street Address:

Telephone Number:

Facsimile Number:

Project Contact Person's Details:

[a] Name & Title

[b] Telephone Number

[c] Email address

Tax Status: You **must** provide certification from the Australian Tax Office [ATO] that shows that the ATO has endorsed your organisation's tax status with effect from 1<sup>st</sup> July 2000 or later - either by its inclusion in legislation, its inclusion in a publicly accessible register, or by notification. Failure to provide this certificate will result in your application being returned.

Name of the project for which you are seeking a grant:

Brief description of project:

Amount (\$) of grant being requested:

Year 1:\$

Year 2:\$

Year 3:\$

Total budget for the project or activity:

Total budget for your organisation (current year):

**Applicant's declaration:**

I, (insert full name) \_\_\_\_\_ am authorised by the organisation to make this application on its behalf and say that all the information provided is true and correct. I have read the terms and conditions relating to the application for a grant from The Felton Bequest, including the Privacy Statement and Consent to use of personal information, and agree to those terms and conditions.

Date:

Applicant's signature

*Small Grants for the Felton Bequest*  
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Date of this application:	
Organisation Website address:	
Has your organisation received funding from The Felton Bequest before? Yes/No (circle)	
In what area(s) of interest of The Felton Bequest does this application fit?	
<input type="checkbox"/> Vulnerable children and young people needing supported education and training pathways	<input type="checkbox"/> Projects focused on indigenous groups and communities
<input type="checkbox"/> Projects located in rural and regional areas	<input type="checkbox"/> Early intervention projects and prevention programs that tackle the causes of disadvantage
<input type="checkbox"/> Helping meet the needs of women and children in health care and access to health care	<input type="checkbox"/> Other (specify):
What does your organisation do? (Provide a brief overview including mission or purpose, major program areas and distinctive organisational attributes, number of staff and volunteers)	
What would you like the grant for? (Describe the project in general; the need it aims to meet; who it will benefit)	
How much will it cost? (Provide a project budget and indicate if it is part of a bigger project?). Note that the maximum grant size is \$10,000.	
Does the Amount Requested cover the full project cost? Yes/No (circle)	
When will the project happen?	
How will you let us know if the funds granted created benefit?	

*Small Grants for the Felton Bequest*  
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Applying for a small grant from the Felton Bequest:

1. Read all material in the *Grant Guidelines for the Felton Bequest*.
2. Submit your application using the Small Grants Application Form: and supply all the information requested, including signatures and dates, and copies of your organisation's taxation status.
3. Complete a separate application for each project for which you are seeking a grant.
4. Do not include any materials other than those specifically requested.
5. Sign and date the Small Grants Application Form.
6. Review the checklist and enclose a copy with your application
7. Post or deliver the application to Philanthropy, ANZ Trustees. Email submissions will not be accepted.

Closing dates for applications:

Closing times are 5pm on the 1 April each year. Late applications will not be accepted. If the closing date falls on a weekend, you may submit until 5pm on the following Monday. Committee meetings are usually held within twelve (12) weeks of the closing date.

Lodgement of applications:

Postal address  
Philanthropy  
ANZ Trustees Limited  
PO Box 389  
Melbourne Vic 3001

Delivery address  
Philanthropy  
ANZ Trustees Limited  
4/100 Queen Street  
Melbourne Vic 3000

Further information:

If you have any questions or require further information please email us at: [Charitabletrusts@anz.com](mailto:Charitabletrusts@anz.com)

## PRIVACY STATEMENT AND CONSENTS

This statement applies to ANZ Trustees Limited ABN 33 006 132 332 (ANZ Trustees), the other Trustees of the particular charitable trust, settlement or foundation (Trust) to which your grant application relates (together, Trustees) and advisors appointed by the Trustees or otherwise under the terms of the Trust to advise or assist the Trustees in considering your grant application.

### Collection of personal information

In its application to ANZ Trustees for a grant, your Organisation (the Applicant) gives ANZ Trustees contact details and other personal information about directors and other key personnel (Individuals). In the future ANZ Trustees, its researchers and advisors may obtain other information about the Individuals from the Applicant, from any of them, or from other sources. We may collect 'sensitive information' but only when it is necessary for the purpose of the Application. This is all "Personal Information".

### Use of personal information

We use Personal Information for the primary purpose of assessing the Applicant's application, and if it is successful, to provide a grant to the Applicant.

We may also use Personal Information for our internal operations including accounting, record keeping, archiving, compliance monitoring and compliance with legislative and regulatory requirements.

Without some or all of your information, we might not be able to process your application.

If your application is not successful, we may hold Personal Information we collect in relation to the application for our records. If your application is successful, after the grant is completed we may hold Personal Information concerning the grant for our records. We will not continue to hold Personal Information if it is not necessary.

### Disclosure of Personal Information

We may disclose Personal Information for the purposes set out above, to people and organisations who carry out functions for us, for example our agents and our researchers, any person you authorise, your legal advisers, any party to whom we are authorised or required by law to disclose the Personal Information, and any party to whom the person whose Personal Information we hold authorises us to disclose it.

### Data quality

We take reasonable steps to make sure that the Personal Information we collect, use and disclose is accurate complete and up to date.

### Data security

We take reasonable steps to protect the Personal Information we hold from misuse and loss and from unauthorised access, modification or disclosure.

### Access and correction to personal information

Subject to exceptions permitted by law, an Individual may obtain access to the Personal Information we hold about them by contacting the Trustees at the address set out below. An access fee may apply. If we are informed by an Individual the Personal Information we hold about them is not accurate, complete or up to date, we will take reasonable steps to correct it.

Where we receive and keep Personal Information about an Individual from another source, generally that person will have the same access to that information and it can only be used for the same purposes and shared with the same persons as the Personal Information that you give us. However, to the extent permitted by law, Personal Information that we receive from other sources will be kept confidential.

### Informing Individuals

You must inform each Individual of the contents of this Statement and Consent. By signing the Application for a grant, you acknowledge you are aware of this Statement and, on behalf of each Individual, consent to sensitive information being collected if it is necessary for the purposes of the Application.

If you require any further information about privacy, please contact us:

Philanthropy, ANZ Trustees  
GPO Box 389, Melbourne, 3001  
Email: [Charitabletrusts@anz.com](mailto:Charitabletrusts@anz.com)  
Facsimile: (03) 9273 6354

## *Small Grants for the Felton Bequest*

*(Closing date: 1 April each year)*

This application checklist is intended to assist you to lodge a complete application. Complete and sign the checklist and attach a copy behind each application cover sheet.

Have you read the Privacy Statement?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you read the Guidelines?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does your project fit the Guidelines?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included copy of your TCC documentation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you signed the application Cover Sheet?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included a response to each item under Project Information and Organisational Information?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included the original and one copy of everything requested?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Signed:		
Date:		

If you have not received an acknowledgement of your application three (3) weeks after the advertised closing date, please email us at [Charitabletrusts@anz.com](mailto:Charitabletrusts@anz.com)

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