

Frequently Asked Questions

These FAQs have been prepared to assist you apply for, and manage, a grant from the trusts and foundations managed by ANZ Trustees. The responses are general in nature and we encourage you to refer to specific trust guidelines in preparing a grant application. The terms “trust” and “foundation” are used interchangeably in these FAQs.

Applying for a Grant

Q: How do I apply for a grant?

A: ANZ Trustees manages a wide range of charitable foundations. Our guidelines provide information about how to apply for grants for specific and general charitable purposes, and in certain cases, on the organisations eligible to apply. To apply for a grant: 1) Read the guidelines carefully to ensure your organisation and project are eligible and an appropriate fit. 2) Complete the application form. 3) Attach all requested support documentation. 4) Post or deliver to ANZ Trustees by the relevant closing date at the address listed.

Q: Who can I contact if I have a query?

A: If you cannot resolve your query by reference to our website, please email us at charitabletrusts@anz.com. If your query is urgent call us on 1800 808 910.

Q: Why do some guidelines require me to attach a copy of my organisation's Tax Concession Charity (TCC) and/or Deductibility Gift Recipient endorsement (DGR)?

A: Sometimes, in order to determine that your organisation is legally eligible to receive a grant from a foundation managed by ANZ Trustees, we require a copy of your organisation's tax endorsements. Some of our foundations require TCC only and some require TCC and DGR. It is important you refer to the guidelines for the foundation to which you are applying and include the tax endorsements required, otherwise your grant application may be returned to you.

For our foundations that require DGR, we are unable to pay grants or donations to an ancillary fund or a prescribed private fund (effectively other grant making bodies).

Where an organisation uses different names, such as a business name and a legal name, the application must be made in the name of the entity with DGR status.

Q: Can my application be auspiced by another organisation?

A: No. Auspicing refers to the practice of an organisation which does not have DGR and TCC status applying to our foundations under the name of another organisation which does have the required tax status.

The organisation applying to our foundations must be the organisation which would run the project or program for which a grant is being sought.

Q: Can I apply for a grant as an individual?

A: The foundations administered by ANZ Trustees do not provide grants directly to individuals or unincorporated bodies. An exception to this are foundations which are established specifically to provide scholarships.

[Q: How do I apply for one of the scholarships managed by ANZ Trustees?](#)

A: This website outlines our scholarship programs and the application process for each. If you are interested in the Dafydd Lewis or Mary Jane Lewis Scholarship Foundations please visit <http://www.dlewis-scholarship.org.au> for further information.

[Q: When are the deadlines for applications to be lodged?](#)

A: Each foundation has different closing dates which are listed on this website. Closing times are 5pm on the closing date stated and late applications will not be accepted. If the closing date falls on a weekend or Victorian public holiday, you may submit until 5pm on the following business day.

[Q: Can I email my application?](#)

A: We accept paper applications only by mail or in person. Please provide the requested number of application copies as stated in the guidelines. For some trusts and foundations we also request an emailed copy of your application in addition to a paper copy.

Postal address

Philanthropy
ANZ Trustees
GPO Box 389
Melbourne Vic 3001

Delivery address

Philanthropy
ANZ Trustees
4/100 Queen Street
Melbourne Vic 3000
(All hand delivered mail must be delivered to the Mail Room on the Ground floor at 100 Queen Street)

[Q: How do I know that you have received my application?](#)

A: An acknowledgement email will be sent to you with further information about time lines within three weeks of the advertised closing date.

[Q: When and how will I find out if my application has been successful?](#)

A: You will be notified of when you can expect to receive a decision when we email to confirm we have received your application. Written advice of the Trustees' decision is usually sent to applicants 12 weeks after the closing date, together with the grant payment.

For successful applicants, the letter of advice will detail conditions, if any, attached to the grant, as well as reporting requirements. Annual progress reports and a final report are required. Report formats are sent to successful applicants with the advice letter and with each instalment in the case of multi-year grants.

[Q: Are application forms available in any alternative accessible formats?](#)

A: Not at this stage. We are currently considering how to make our granting programs more accessible, including offering grant application forms in alternative accessible formats.

[Q: Can I put in more than one grant application to the one trust or foundation per granting round?](#)

A: We generally receive more applications than we can fund during any one granting round. We look more favourably upon an organisation which is able to prioritise its own activities and focus on the project with the highest potential impact.

Reporting and Instalment Payments

Q: My organisation has been given a multi-year grant. How do I obtain an instalment payment?

A: Grant instalments are generally paid annually after the anniversary of the grant. To receive your instalment payment, send a completed progress report. Once this has been reviewed and considered satisfactory, the next payment will be made. Report formats are available on this website. www.anz.com/anztrustees Do not send an invoice.

Q: What project reporting must I provide to ANZ Trustees?

A: ANZ Trustees is very interested in the outcomes of projects funded. We expect to see a final report at the end of a project. Projects which extend beyond a 12 month period need to submit a progress report annually. Report templates are on this website. www.anz.com/anztrustees

Progress reports must be received before the next instalment is paid on multi-year grants.

Acknowledging the Foundation

Q: How and when should I acknowledge the foundation and/or ANZ Trustees?

A: ANZ Trustees understands your organisation may want to celebrate its involvement with our charitable foundations publicly, and we ask that you adhere to our guidelines when naming our trusts. Please email us at charitabletrusts@anz.com specifying your organisation, the project name, our reference number and the foundation which has supported your project. We will email you the appropriate guidelines for acknowledging the foundation. These guidelines are also included in the letter we send advising of a successful grant.

Q: Where can I get the logo for a trust or foundation managed by ANZ Trustees?

A: Send an email to charitabletrusts@anz.com specifying your organisation, the project name, our reference number and the foundation which has supported your project. We will email you the appropriate logo and conditions of its usage.

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