

## Charitable Sub-fund Establishment Form

### SUB-FUND PROFILE

The following information will help Australian Communities Foundation work with you to develop and implement your giving. It will be used as a basis for regular donor reviews, is not binding and can be updated at any time.

### VISION STATEMENT /FUNDING PRIORITIES

This will be used in the Annual Report, eg. "For general charitable purposes, in particular education and the combating of disadvantage". Please include any specific organisations you are interested in supporting.

### NOMINATED ADVISORY COMMITTEE

If the donor wishes to establish a sub-fund Advisory Committee (to assist in making requests to the Trustee) please provide the additional names, addresses, and contact details of committee members.

Name

Mr  Ms  Mrs  Other

Address

Telephone

 

Mobile

Email

Authorised to make requests for grantmaking

Name

Mr  Ms  Mrs  Other

Address

Telephone

 

Mobile

Email

Authorised to make requests for grantmaking

Name

Mr  Ms  Mrs  Other

Address

Telephone

Mobile

Email

- Authorised to make requests for grantmaking  
(Please attach any other contacts as appropriate)

### DONOR GRANTMAKING INTERESTS

1. Please tick one or more below.

Area of interest

- |  |  |
|--|--|
| <input type="radio"/> Arts & culture                   | <input type="radio"/> Community development & advocacy |
| <input type="radio"/> Community services & welfare     | <input type="radio"/> Disability                       |
| <input type="radio"/> Education, training & employment | <input type="radio"/> Environment & conservation       |
| <input type="radio"/> Health & medical research        | <input type="radio"/> Overseas aid & development       |

Target Groups

- |   |  |
|---|--|
| <input type="radio"/> Children/young people | <input type="radio"/> Indigenous                 |
| <input type="radio"/> Older people          | <input type="radio"/> Refugee & asylum seeker    |
| <input type="radio"/> Women & girls         | <input type="radio"/> Other <input type="text"/> |

2. Please list any charitable organisations to which you request standing, periodic/other grants to be made by Australian Communities Foundation. These grants are generally made annually in November.

Organisation Name	\$ or % of income
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

3. In order to keep our donors informed about relevant issues, events and project requests we maintain a number of group email lists. Please indicate the email lists on which you would like to be included. (Please note that emails are addressed to the fund contact/s).

- |  |  |
|--|--|
| <input type="radio"/> Arts & culture             | <input type="radio"/> Community support          |
| <input type="radio"/> Disability                 | <input type="radio"/> Environment & conservation |
| <input type="radio"/> Health & medical research  | <input type="radio"/> Indigenous                 |
| <input type="radio"/> Overseas aid & development | <input type="radio"/> Refugee & asylum seeker    |
| <input type="radio"/> Women & Girls              |  |

#### 4. Support for Australian Communities Foundation

As a community not-for-profit organisation, Australian Communities Foundation relies on the generosity and support of donors to help build its capacity and resources to effectively meet community needs and promote accessible philanthropy. Please indicate if you would be interested in supporting the Foundation.

- Yes
- No
- Don't know

#### SUB-FUND RECOGNITION

Australian Communities Foundation includes information about sub-funds, donors and grants in its newsletters and publications and on its website. Please indicate any preferences below

- I would like Australian Communities Foundation to include a sub-fund profile on the website.
- I would like Australian Communities Foundation to feature the sub-fund in the Foundation's print and online publications.
- I am willing to be interviewed for media stories.

#### FURTHER DONATIONS

It is a requirement of Australian Communities Foundation that sub-funds build to a minimum balance of \$100,000. Please indicate how you intend to build the amount attributed to the sub-fund.

- personal assets (during lifetime)
- through a bequest/my estate
- from one or more planned gifts (eg, upon sale of an asset)
- from family and friends
- as a result of broader community fundraising efforts
- other (please specify)

#### SUCCESSION

There are a number of ways a sub-fund continues to give once you are no longer involved (for example, after death, through incapacity or upon resignation as sub-fund contact). Some donors request that Australian Communities Foundation continues to make grants in line with the founding donor's interests and preferences. Others see it as an opportunity to help successive generations learn about and become involved in charitable giving. Please indicate your preference.

- I have no plans or preferences at this stage.
- I request that Australian Communities Foundation continues to grant 80% of the annual income from the sub-fund in line with my vision statement.
- I request that Australian Communities Foundation continues the named sub-fund and makes grants attributed to the sub-fund.
- I want to appoint successor advisers/designated individual(s) to request grants attributed from the sub-fund in the future. I acknowledge any successor will be required to sign an acknowledgement similar to the establishment application form.
- I request that Australian Communities Foundation discontinues the named sub-fund and treats the money in the sub-fund as part of its general account for grantmaking.

Please provide contact information below:

Name

Mr  Ms  Mrs  Other

Address

Telephone

Mobile

Email

Relationship

Name

Mr  Ms  Mrs  Other

Address

Telephone

Mobile

Email

Relationship

#### OTHER COMMUNITY INTERESTS

If you would like to have active involvement in the organisations and activities supported through Australian Communities Foundation (such as undertaking site visits, exploring possible volunteering opportunities) please give details below:

## PROFESSIONAL ADVISER INFORMATION

Australian Communities Foundation works with professional, legal and financial advisers with one goal in mind, helping them to help their clients realise their philanthropic objectives.

We have a growing database of professional advisers, our referrals from this sector continues to increase and through a series of seminars and forums we provide accurate and timely information on a number of philanthropy and charitable issues so they can better serve their clients.

Many people open sub-funds with advice from a lawyer, accountant, financial adviser, or other professional. Please provide details of your advisers for our database.

### Adviser 1

Name

Mr  Ms  Mrs  Other

Type of adviser (check one)

- Lawyer  Financial Planner  Accountant

Company name

Business address

Postcode

Telephone

Email address

### Adviser 2

Name

Mr  Ms  Mrs  Other

Type of adviser (check one)

- Lawyer  Financial Planner  Accountant

Company name

Business address

Postcode

Telephone

Email address

**HOW DID YOU HEAR ABOUT AUSTRALIAN COMMUNITIES FOUNDATION?**

It is very helpful for us to understand how donors hear about Australian Communities Foundation.  
Please mark all that apply:

- Board or staff member
- Australian Communities Foundation donor or sub-fund
- Professional adviser
- Searching the web
- Coverage in the media
- An advertisement
- Attending a presentation or event
- Word of mouth
- Other

Name

**MORE ABOUT YOU**

Please feel free to add any other relevant information on your background or interests that would help us better support you in your grantmaking and philanthropic activities.



Please check you have filled out all fields. When you click on the above button this form will open your email program and send this form to Australian Communities Foundation. Thank you.