



Melbourne Community Foundation
– for good for ever –

Donation and Request Form
To Establish Tax Deductible Scholarship Sub-Fund

To: Community Foundation Network Ltd (the **Trustee**)
as trustee of Melbourne Community Foundation (MCF) ABN 57 967 620 066

1. Donor Details

Name and address: _____

Contact Details

Home telephone _____
Work telephone _____
Mobile _____
Fax _____
Email _____

2. Main contact if different from above, please specify

3. Nominated Advisory Committee

The Donor wishes to establish an Advisory Committee to assist it in making requests to the Trustee.
Please provide complete name, address, contact numbers and email address.

Please specify Advisory Committee members authorised to make requests for grantmaking

4. Donations

The Donor proposes to make unconditional gifts to Melbourne Community Foundation, starting with a gift of:

\$ _____

The Donor requests a sub-fund be maintained by the Trustee for the recording of gifts from the Donor and others as requested by the Donor in writing, and money received from those gifts.

The Donor requests the sub -fund subject to the Trustee's discretion, be named:

5. Maintaining the Sub-Fund

Please select the appropriate box.

- The Donor requests MCF record gifts at any time from other Donors into the sub-fund where the other Donors indicate
- The Donor wishes to make a total donation of \$ _____ over _____ years.
- The Donor wishes to use a bequest to establish a named sub-fund.

The Donor acknowledges:

- (a) the gifts form part of the trust fund of Melbourne Community Foundation and do not form a separate fund
- (b) the Trustee may change the name of the sub-fund if it is required under law or recommended by the ATO and will consider any request from the Donor as to a change in name
- (c) the assets will not be invested separately from the trust fund
- (d) the assets will not be separately accounted for in the statutory financial statements of Melbourne Community Foundation, though, separate management accounts in respect of the assets will be maintained for the purposes of internal management and identification. The Trustee will provide bi-annual reports of the investments and application of the sub-fund to the Donor but is not to be under an obligation to do so
- (e) the Trustee may at any time cease to maintain a sub-fund and account for the money and investments in the general accounts for the Trust Fund
- (f) that sub-funds of less than \$20,000 will be reviewed annually and that the Trustee will consider whether sub-funds that have been inactive for two years should be rolled into the general fund and no longer operate as a sub-fund. Each sub-fund will be considered individually taking into account donor wishes and intentions.
- (g) the Trustee is required to distribute a minimum of 80% of all income generated from investment across each sub-fund.

6. Educational purposes requirements of the Scholarship Fund

The donor understands that a subfund established under the MCF's Scholarship Fund will be required to meet the educational purposes requirements of the overall Fund as specified in Division 30-B of the Income Tax Assessment Act 1997 (ITAA 97) (as item 2.1.13 of the table in section 30-25(1)).

These include:

1. the fund's purposes must be charitable;
2. the fund must be to **solely** provide money for scholarships, bursaries or prizes;
3. the recipients must be Australian citizens or permanent residents of Australia;
4. the scholarship, bursary or prize must be open to at least an entire state or territory of Australia, or to a region of at least 200,000 people;
5. the scholarship, bursary or prize must be to promote the recipient's education in either or both:
 - (a) a pre-school, primary, secondary or tertiary course;
 - (b) an overseas educational institution, by way of study of a component of a pre-school, primary, secondary or tertiary course;
6. the scholarship, bursary or prize must be awarded on merit or for reasons of equity.

7. Donor Interests

The Donor has the following educational scholarship, bursary or prize preferences which the Trustee may take into consideration when grantmaking:

The Donor wishes to make a standing request to the Trustee that funds from the Donor's gifts are applied to the following educational scholarship, bursary or prize:

The Donor wishes to be informed of the Trustee's proposed grantmaking program together with an outline of any community projects or eligible charities the Trustee is considering funding, in order for the Donor to indicate a preference as to the application of funds from the Donor's gifts.

YES NO

The Donor proposes to make requests to the Trustee where funds from the Donor's gifts can be applied.

YES NO

The Donor understands, in relation to any option as to making requests or indicating preferences as to grantmaking that:

- i. the Trustee is not required to respond to any request or indicated preference or to make a grant in accordance with a request or preference
- ii. the Trustee may invite the Donor to make any requests or indicate preferences at certain times but the Trustee is not required to invite the Donor
- iii. the Trustee may make grants from the funds from the Donor's gifts along with other money in the trust fund without first advising the Donor or seeking a request.

On the Donor's death, the Trustee may agree to continue the named sub-fund and receive requests from a person nominated by the Donor, if that person signs an acknowledgement form similar to this, as required by the Trustee. Complete the details of the person, if the Donor wishes to make that nomination in this form.

Please provide complete name, address, contact numbers and email address.

I understand the management of donor requests in accordance with the above paragraphs is necessary for any donations from me to be tax deductible.

DATE

SIGNED by the Donor

Name of signatory

Acceptance by the Trustee

SIGNED for and on behalf of Community
Foundation Network Ltd

DATE
