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# Named Funds Donation Form and Terms



To: Fremantle Foundation Ltd (the trustee)  
As trustee of Fremantle Foundation Trust and Fremantle Foundation Scholarship Trust

## 1. Donor Details

Name \_\_\_\_\_

Address \_\_\_\_\_

## 2. Contact Details

Home Phone \_\_\_\_\_

Work Phone \_\_\_\_\_

Mobile \_\_\_\_\_

Fax \_\_\_\_\_

Email \_\_\_\_\_

## 3. Contact Preference

Please specify preferred method for future contact: \_\_\_\_\_

#### 4. Donations

4.1 The Donor proposes to make unconditional gifts to the Fremantle Foundation, starting with a gift of:

\$ \_\_\_\_\_

4.2 The Donor requests a Named Fund (referred to here as a management account) 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 management account be named, subject to the Trustee's discretion:

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4.3 The Donor acknowledges:

- the gifts from part of the trust fund of Fremantle Foundation and do not form a separate fund;
- the Trustee may change the name of the management account if it is required under law or recommended by the ATO and will consider any request from the Donor as a change in name;
- the assets will not be invested separately from the trust fund;
- the assets will not be separately accounted for in the statutory financial statements of Fremantle Foundation, though separate management accounts in respect of the assets will be maintained for the purposes of internal management and identification. The Trustee may provide reports of the investments and application of the management account to the Donor but is not to be under an obligation to do so;
- the Trustee may at any time cease to maintain a management account and account for the money and investments in the general accounts for the Trust Fund.

#### 5. Ongoing gifts

The Donor intends to make the following gifts over the next \_\_\_\_\_ years.

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## 6. Granting

The Trustees policy is to grant a minimum of 4% of all investment capital from the previous financial year.

What is the Donor's preference on the distribution of grants (percentage or total figure) and accumulation of amounts in the Named Fund:

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The Donor acknowledges that the Trustee may take the above preferences into account but is under no obligation and gives no assurance that these preferences will be followed.

## 7. Grant Making Procedures

Fremantle Foundation distributes general funds under management during an annual grant round. The Fremantle Foundation will advise donors each year of the proposed grant making procedures for general funds under management.

To administer annual grants the Fremantle Foundation either invites or calls on submissions from the community, which are then evaluated and program(s) are identified as suitable for the Foundations support.

Donors with a Named Fund of over \$10,000 may request distributions to other programs for consideration by the Trustee on a rolling basis throughout the year. The Trustee is not required to follow any requests or preferences from the donors and has sole discretion as to the grant making.

7.1 The Donor has the following areas of interest or specific charities of interest which the Trustees may take into consideration when making grants:

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7.2 The Donor wishes to make the standing request to the Trustee that funds from the Donor's gifts are applied to the following areas or interest or specific charities:

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7.3 The Donor wishes to be informed of the Trustee's proposed grant making program together with an outline of any eligible charities the Trustee is considering funding:

Yes      No

7.4 The Donor proposes to make requests to the Trustee as to the application of the funds from the Donor's gifts for grant making from time to time.

Yes      No

## 8. Point of contact

8.1 The point of contact between the Donor and the Trustee for indicating any requests for grant making is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Mobile \_\_\_\_\_

Fax \_\_\_\_\_

Email \_\_\_\_\_

Preferred method of contact \_\_\_\_\_

## 9. The Trustees Role

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

- 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;
- 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;
- 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.

8.2 On the Donors death, the Trustee may agree to continue the named management account and receive requests from a person nominated by the Donor, if that person signs an acknowledgment or form similar to this form as required by the Trustee. Complete the details of the person, if the donor wishes to make that nomination in this form:

**10. Person Nominated by Donor**

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Mobile \_\_\_\_\_

Fax \_\_\_\_\_

Email \_\_\_\_\_

Preferred method of contact \_\_\_\_\_

Date \_\_\_\_\_ Signed \_\_\_\_\_

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 \_\_\_\_\_

Name of Donor \_\_\_\_\_

Signature of Donor \_\_\_\_\_