

# JBWere Charitable Endowment Fund

## Grant Request Form

If you wish to update or change any requests about the Charitable Organisations to which you wish the CEF to make Annual Grants, please complete this form and return it before 30 October of the year in which you wish your recommendation to be considered. If this form is received after that date, your request may not be able to be considered until after that year's grants are made.

### 1. JBWere Charitable Endowment Fund (CEF) management account details

Management account name

Management account number

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### 2. Charitable Organisation request

Please select **one** of the following boxes below:

- Replace all previous requests with new requests made in this form.
- Add the requests made in this form to the previous requests.
- Ad-hoc request (once-off payment) with no change to annual distribution requests

### 3. Requested Charitable Organisations

The net capital balance of the CEF management account attributed to you determines the number of Charitable Organisations you can request to receive grants from the CEF (see below). Please refer to your last statement or contact the JBWere Philanthropic Services team for the net capital balance of the CEF management account attributed to you and the Charitable Organisations you have previously requested.

Net Capital Balance	Number of Charitable Organisations
Up to \$50,000	Up to 2
\$50,000 to \$100,000	Up to 5
\$100,000 to \$1 million	Up to 10
\$1 million +	Up to 20

Please set out below the Charitable Organisations to which you wish the Trustee to make grants from the CEF. You can request up to five Charitable Organisations in this section. If you wish to request additional Charitable Organisations, please list and attach details to this form.\*

Please ensure that all nominated organisations endorsed are Item 1 Deductible Gift Recipients (DGRs).

### 1st Charitable Organisation

Full name

Address

  

State

Postcode

Australian Business Number (ABN)

Percentage of declared distribution

%

OR Dollar Distribution

\$

### 2nd Charitable Organisation

Full name

Address

  

State

Postcode

Australian Business Number (ABN)

Percentage of declared distribution

%

OR Dollar Distribution

\$

### 3rd Charitable Organisation

Full name

Address

  

State

Postcode

Australian Business Number (ABN)

Percentage of declared distribution

%

OR Dollar Distribution

\$

### 4th Charitable Organisation

Full name

Address

  

State

Postcode

Australian Business Number (ABN)

Percentage of declared distribution

%

OR Dollar Distribution

\$

## 5th Charitable Organisation

Full name

Address

  


State

Postcode

Australian Business Number (ABN)

Percentage of declared distribution

%

OR Dollar Distribution

\$

\* Please note that in order to receive grants from the CEF, each of the Charitable Organisation(s) you request must be Eligible Charitable Organisations for the purpose of the Trust Deed.

Please note the ultimate decision which Eligible Charitable Organisations will receive grants from the CEF rests with the Trustee, as it is the Trustee's responsibility to ensure all funds donated to and disbursed from the CEF are dealt with in accordance with all relevant laws.

## 5. Authorisation

If the CEF management account attributed to you is a joint account requiring both donors to authorise any changes, please ensure both donors sign below. Please refer to your last statement or contact the JBWere Philanthropic Services team to confirm the authorised parties.

### 1st individual

**Capacity** (if applicable)

Director

Power of Attorney\*

Sole director and sole secretary

Trustee/Secretary

Signed by: Full name

Signature

Date signed (DD/MM/YYYY)

### 2nd individual

**Capacity** (if applicable)

Director

Power of Attorney\*

Sole director and sole secretary

Trustee

Signed by: Full name

Signature

Date signed (DD/MM/YYYY)

\* If you are signing under a Power of Attorney, please supply a certified copy of the Power of Attorney with specimen signature(s) of attorney(s). Companies signing by duly authorised representatives must provide proper notice of the representatives to JBWere. If signed under Power of Attorney, the attorney hereby certifies that no notice of revocation of that power has been received by the attorney. Application by Incorporated Bodies/Clubs must be signed by the authorised office bearers (e.g. A. Smith - President) and a copy of the Constitution/Rules attached.

Please return your completed Grant Request Form to:

**JBWere**  
**Philanthropic Services**  
**GPO Box 4370**  
**Melbourne Vic 3001**

National Australia Trustees Limited ABN 80 007 350 405 (NAT) is the Trustee of the JBWere Charitable Endowment Fund. NAT is a wholly-owned subsidiary of National Australia Bank Limited ABN 12 004 044 937. JBWere Ltd ABN 68 137 978 360 (JBWere) is a wholly owned subsidiary of the National Australia Bank Group Limited (the NAB Group). A donation to the CEF is not a deposit or liability of NAB or any of its related bodies corporate.

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