



Melbourne Community Foundation
– for good for ever –
Donation and Request Form
To Establish a Tax Deductible Sub-Fund

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

1. Donor

Name of Donor _____

Contact Details

Address: _____

Home telephone: _____

Work telephone: _____

Mobile: _____

Fax: _____

Email: _____

2. Main contact if different from above

3. Nominated Advisory Committee

If the Donor wishes to establish an Advisory Committee to assist it in making requests to the Trustee please provide their name, address, contact details.

Name: _____

Address: _____

Home telephone: _____

Work telephone: _____

Mobile: _____

Fax: _____

Email: _____

Name: _____
Address: _____
Home telephone: _____
Work telephone: _____
Mobile: _____
Fax: _____
Email: _____

4. Please specify Advisory Committee members authorised to make requests for grantmaking.

5. Donations

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

\$ _____

Cheques to be made out to 'Melbourne Community Foundation'

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:

6. 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 have requested they wish to do this.
- 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.

7. MCF Grantmaking Process

Melbourne Community Foundation tax deductible fund can make grants to charitable organisations endorsed by the ATO as having TCC (Tax Concession Charity) and DGR (Deductible Gift Recipient) status.

MCF does not have a public submission process. Organisations and projects selected to be considered for support will be based on knowledge, research and discussion between MCF Board members, donors, staff and community partners.

The Trustee is not required to follow any requests or preferences from the Donors and has sole discretion as to the grantmaking.

Decisions regarding the organisations and projects to be supported by MCF will rest solely with the Trustee and will not be subject to appeal.

8. Donor Grantmaking Interests

The Donor has the following areas of interest which the Trustee may take into consideration when grantmaking:

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

YES NO

The Donor wishes to make a standing request to the Trustee that funds from the Donor's gifts be applied to the following charitable organisation/s.

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 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:

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
