

OTAMA MARERE (PAENGAROA NORTH A5) TRUST DISCRETIONARY GRANT APPLICATION FORM

Otama Marere Discretionary Grants are available to assist with costs associated for Kaupapa Māori, cultural pursuits and whānau activities of a registered shareholder or a beneficiary of a whānau trust in Otama Marere who can demonstrate a need or hardship. The amount of the Discretionary grant is up to \$1,000.00. The Trustees reserve the right to suspend or vary the amount of the grant, dependant on the financial position and commitments of the Trust.

Discretionary Grant Policy and Criteria

- Discretionary Grant applications will only be accepted if the applicant meets the following criteria:
 - there is no age criteria for registered shareholder of Otama Marere or a beneficiary of a whānau trust that is a shareholder in Otama Marere;
 - the Applicant has accurately and completely filled in the application form;
 - the Applicant has provided all requested supporting documents; and
 - there are no retrospective applications; ie invoices have to be less than three (3) months old.
- Discretionary Grants may be paid to a health provider (as decided by the trustees) or to an organisation/ organising committee on production of information to the satisfaction of the trustees.

Name of Owner/Shareholder

Full Name: _____

Whānau Trust (If applicant is a beneficiary of a Whānau Trust): _____

You will need to have an Owner or Trustee sign this form and provide their name and email address.

Owner or Trustee name: _____

Owner or Trustee signature: _____

Owner or Trustee email: _____

Whakapapa: _____

Registered shareholder ID

Applicant's name

Father

Mother

Paternal Grand parents

Maternal Grand parents

Applicants Details:

Full Name: _____

Postal Address: _____

City: _____

Postcode: _____

Please send your completed application forms to:
Perpetual Guardian, PO Box 1040, Rotorua 3215

Please direct any questions to Shirley Pahl at Perpetual Guardian:

- By telephone: (07) 921 7684
- By email: shirley.pahl@pgtrust.co.nz

Telephone: _____ Email: _____

Discretionary Grant Payment

Type of Grant requested:	Kaupapa Māori	Cultural pursuits	Whānau activity
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The Applicant must provide one of the following options for payment to be processed:

1. If payment is to be made to the health provider, an invoice for their services;
2. If payment is to be made to an organisation/committee, a request on letterhead;
3. Payment will only be made with verification of bank account details as follows:
 - An original bank stamped deposit slip; or
 - An original or copy of your bank statement stamped by bank; or
 - Have the bank stamp your Discretionary Grant application in the space provided below.

	Bank account details	Affix bank stamp here
Full name of bank		
Full branch address		
Bank account number		
Bank Account name		

Please note that the Applicant must provide a copy of one of the following with this form:

- Driver's Licence or Passport; **or**
- Other photo identification (note: only valid if signature and name is also on ID); **or**
- **Two** forms of other ID (e.g. Community Services Card/Bank Card with name and signature included).

Applicant's Acknowledgement:

- I confirm that the above information is true and correct (Please tick)
- I confirm that I am the appropriate person to apply for this grant (Please tick)
- I accept the Privacy Statement attached to this application (Please tick)

Date: ____ / ____ / ____

Applicant's Signature: _____

OTAMA MARERE - PRIVACY STATEMENT

- Your personal information is being collected so that the Trustees can consider your application, check it against the criteria, operate and administer the Discretionary Grant application and for the other purposes set out in this application form.
- Your personal information will be collected and held by Perpetual Guardian, 1130 Pukaki Street, Rotorua in accordance with the Privacy Act 1993 and on behalf of Otama Marere. If you wish to gain access to or request correction of your personal information please contact Shirley Pahl via email at shirley.pahl@pgtrust.co.nz or by telephone (07) 9217684.
- All Discretionary Grants are subject to the Otama Marere Discretionary Grant policy. The Discretionary Grant Policy is available to view on the Trust website www.otamamarere.com. If you do not have access to the website then please contact Shirley Pahl via email at shirley.pahl@pgtrust.co.nz or by telephone (07) 9217684.