

OTAMA MARERE TRUST EDUCATION GRANT POLICY

Vision and Intent

- To provide financial support for Otama Marere landowners and those who whakapapa to the whenua in the pursuit of tertiary studies in order to foster ongoing, higher learning for our Hapū.
- Grants are offered in recognition of the applicant undertaking fulltime study at tertiary level with recognised providers (whether in New Zealand or overseas) and are not intended to defray the cost of studying or training.

Objectives

- To ensure that Trustees have a clear and consistent process for assessing grant applications.
- To provide members with clear criteria and requirements for grant applications.
- To enable Otama Marere to offer appropriate levels of funding to support tertiary level education.

Annual Funding

- The level of funding available for education grants from year to year will be at the discretion of Trustees in accordance with prudent budgetary practice. There is no expectation that all costs associated with fees and living expenses for the applicant can be met with a grant.
- The individual level of funding available for education grants will be at the discretion of Trustees and will be directly related to the information provided by the applicant.

Terms of Education Grants

- Fulltime students enrolled at a recognised tertiary institution (whether in New Zealand or overseas) are eligible to apply for an education grant.
- Opening and closing dates for the taking of applications for education grants will be advertised on the Otama Marere website each year. Applicants may only apply for an education grant between the opening and closing date of each specific year. The dates will be specified on the Otama Marere website, being www.otamamarere.com

- There is no age limit for applicants.
- All applications must be completed by the closing date for each education grant period as specified on the Otama Marere website, being www.otamamarere.com
- An application will not be considered to be complete unless an applicant has provided certified photo identification in
- Otama Marere will provide successful applicants with payment of their allocated education grant in a timely manner after the closing date for application has concluded. Given the substantial level of applications and the ratification of the grant applications by the Trustees (including the Advisory Trustees), each applicant should expect to receive their grant monies within one (1) month of the closing date for grant applications.

Privacy Policy

- Otama Marere Trust (and by nature of being Responsible Trustee, Perpetual Guardian) collects and holds the personal information supplied by all education grant applicants. This information is used, held and collected for the purposes of trust Reporting, updating landowners, record keeping, financial reporting and general trust business.
- The personal information collected may be provided in forms filled out by individuals, face to face meetings, email messages, telephone conversations or by third parties.
- Each applicant is required to give express consent to Otama Marere Trust to use their name, education details and the level of funding they receive for the purposes of reporting to the Otama Marere Trust landowners, for the purposes of any financial reporting and for display in any Trust booklets, website or newsletter.
- Information collected and held by Perpetual Guardian is able to be accessed by any employee of Perpetual Guardian.

Applications

- All applications are to be made through the Otama Marere website, being www.otamamarere.com, unless otherwise agreed to by the client manager for Perpetual Guardian.

- In addition to completing the application online, in order to complete their application in full, **each year**, each applicant **must** provide the following information to Perpetual Guardian:
 - **Certified Photo identification:**
Each applicant must provide a certified copy of their Passport, New Zealand Drivers Licence, 18+ Card or Photo Student Identification. The copy needs to be certified by a Justice of the Peace, New Zealand Lawyer, Chartered Accountant, Notary Public, New Zealand Honorary Consul or authorised employee of Perpetual Guardian. **An application will not be complete until this has been provided.**
 - **Certified Account Name and Account Number:**
Each applicant must provide a certified copy of a bank statement or ATM printout which clearly displays the applicants name and bank account number. The copy needs to be certified by the applicant's bank, a Justice of the Peace, New Zealand Lawyer, Chartered Accountant, Notary Public, New Zealand Honorary Consul or authorised employee of Perpetual Guardian. **An application will not be complete until this has been provided.**
- After making the application through the Otama Marere website, each applicant will receive an email further detailing the need to provide Certified Photo identification and certified bank account details. If this information has not been received **within fourteen (14) days** of the application closing date, the Trustees may consider that the application is incomplete and may refuse to pay out the grant.
- The postal address for Perpetual Guardian Otama Marere grants is:

Perpetual Guardian
P.O. Box 1040
ROTORUA 3040
- The email address for perpetual Guardian Otama Marere grants is:
Amber.taare@pgtrust.co.nz