

## OTAMA MARERE (PAENGAROA A5) TRUST KAUMĀTUA GRANT APPLICATION FORM

Otama Marere Kaumātua Grants are available only to beneficial owners as per the latest list of owners from the Māori Land Court. Applicants must be 60 years or older. **The annual grant is \$300.00 for those eligible owners aged 60-69 years and \$400.00 for eligible owners aged 70-79 years and \$500 for 80 years and older.** *The Trustees reserve the right to suspend or vary the amount of the grant, dependant on the financial position and commitments of the Trust.*

Full Name: \_\_\_\_\_  
(The name of the Kaumātua Grant Applicant)

Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ IRD Number: \_\_\_\_\_

Postal Address: \_\_\_\_\_

City: \_\_\_\_\_ Postcode: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

### Please complete this section if you are a beneficiary of a Whānau Trust.

Name of Whanau Trust: \_\_\_\_\_

You will need to have one a Trustess sign this form and provide their name & telephone number for one Trustee of the Whānau Trust:

Trustee name: \_\_\_\_\_ Trustee signature: \_\_\_\_\_

Trustee email: \_\_\_\_\_

### Proof of bank account details

Please provide one of the following options with this form to verify your bank details:

- An original bank stamped deposit slip; or
- An original or copy of your bank statement stamped by bank; or
- Have the bank stamp your Kaumātua 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		

Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Signature: \_\_\_\_\_

### Please note 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).

I confirm that I accept the Privacy Statement attached to this application  (Please tick)

## 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 Kaumātua Grant application, and for the other purposes set out in this application form.
- Please fill in ALL areas of this application form. If you do not provide the personal information as and when requested, we may not be able to consider your application and/or award you a Kaumātua Grant.
- In agreeing to the terms and conditions on this application form and submitting it to us, you authorise the release of, and use of, your personal information to and by the Trustees of Otama Marere for all the purposes set out in this application form.
- Your name and grant amount may also be used and published by the Trustees for general Trust Purposes, including, but not limited to, advising shareholders of the payment of the Kaumātua Grant.
- 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](mailto:shirley.pahl@pgtrust.co.nz) or by telephone (07) 9217684.
- All Kaumātua Grants are subject to the Otama Marere Kaumātua Grant policy. The Kaumātua Grant Policy is available to view on the Trust website [www.otamamarere.com](http://www.otamamarere.com). If you do not have access to the website then please contact Shirley Pahl i to request a copy via email at [shirley.pahl@pgtrust.co.nz](mailto:shirley.pahl@pgtrust.co.nz) or by telephone (07) 9217684.