

OTAMA MARERE (PAENGAROA A5) TRUST TANGIHANA GRANT APPLICATION FORM

Otama Marere Tangihana Grants are available to assist with the costs associated with the tangi or funeral expenses of a registered shareholder or a beneficiary of a whanau trust that is a shareholder in Otama Marere. The amount of the Tangihana grant is \$500.00. The Trustees reserve the right to suspend or vary the amount of the grant, dependant on the financial position and commitments of the Trust.

Tangihana Grant Policy and Criteria

1. Tangihana Grant applications will only be accepted if the applicant meets the following criteria:
 - (a) the deceased was a registered shareholder of Otama Marere or a beneficiary of a whanau trust that is a shareholder in Otama Marere;
 - (b) the Applicant has accurately and completely filled in the application form;
 - (c) the Applicant has provided all requested supporting documents; and
 - (d) the application is lodged within three (3) months of the date of death.
2. Tangihana Grants will be paid to an appropriate family member as decided by the trustees, marae, funeral director or to the executor or administrator of the estate on production of information to the satisfaction of the trustees.

Name of the Deceased Shareholder

Full Name: _____

Date of Birth: ____ / ____ / ____ Date of Death: ____ / ____ / ____

Whanau Trust (If deceased is a beneficiary of a Whānau Trust): _____

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

Trustee name: _____ Trustee signature: _____

Trustee email: _____

Evidence of Death (attach evidence – death certificate or family notice from Newspaper)

Place that Tangi/Funeral held: _____

Applicants Details: (Whanau member applying for the Tangihana Grant)

Full Name: _____

Relationship to Deceased: _____

Postal Address: _____

City: _____ Postcode: _____

Telephone: _____ Mobile: _____

Email: _____

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

Tangihana Grant Payment

The Applicant must provide one of the following options for payment to be processed:

1. If payment is to be made to the funeral director, an invoice from the funeral director;
2. If payment is to be made to the marae, an invoice from the marae;
3. If payment is to be made to the executor or administrator of the estate, a copy of the Will, Probate or Letters of Administration and 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 Tangihana 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 Tangihana 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 Tangihana Grants are subject to the Otama Marere Tangihana Grant policy. The Tangihana 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.

