

Amplify your giving

**Named Fund
Establishment Form**

**Fremantle
Foundation**
Philanthropy for WA

FORM 1: NAMED FUND ESTABLISHMENT

Named Fund Holder Details

Title: (Mr, Mrs, Ms, Dr) _____

Name: _____

Postal Address: _____

Suburb: _____

Phone: _____

Email address: _____

Donor Details - Second contact (if applicable)

Title: (Mr, Mrs, Ms, Dr) _____

Name: _____

Postal Address: _____

Suburb: _____

Phone (daytime): _____

Email address: _____

Name of Fund

Name you would like your Named Fund recorded as:

(Please note to meet ATO requirements you cannot use the word "Foundation" in the fund name.)

Acknowledgements & Signature

- the gifts form part of the trust fund of Fremantle Foundation and do not form a separate fund;
- the Trustee may change the name of the management account if it is required under law or recommended by the ATO and will consider any request from the Donor as a change in name;
- the assets will not be invested separately from the trust fund;
- the assets will not be separately accounted for in the statutory financial statements of Fremantle Foundation, though separate management accounts in respect of the assets will be maintained for the purposes of internal management and identification. The Trustee may provide reports of the investments and application of the management account to the Donor but is not to be under an obligation to do so;
- the Trustee may at any time cease to maintain a management account and account for the money and investments in the general accounts for the Trust Fund.

Signature

Signature

Name of Fund Holder

Name of Fund holder

Signature of Executive Officer

Date

Signature of Chair

Date

FORM 2: PREFERENCES

DONOR GRANTING PREFERENCES

Describe the **areas of interest** or **specific charities of interest** which the Trustees may take into consideration when making grants:

FOCUS AREAS

If you are open to ideas on which causes to support, the Fremantle Foundation encourages making an ongoing impact towards the vital issues of the community that we have identified.

Please tick any of the areas below you are interested in supporting.

- HEALTH & WELLBEING**
- HOMELESSNESS**
- EDUCATION**
- ENVIRONMENT**
- FAMILY & COMMUNITY**
- ABORIGINAL ORGANISATIONS**
- ARTS & CULTURE**

FORM 2: PREFERENCES

ANNUAL DISTRIBUTION

The legal requirement is to grant a minimum of 4% of all Funds managed by the Fremantle Foundation Trustees each financial year.

What is your preference on the distribution of Grants?

- Interest Only
- Interest and a Percentage of the fund _____%
- Accumulation

PRIVACY POLICY

The Fremantle Foundation's privacy policy is available online at www.fremantlefoundation.org.au/privacy or you can email us at admin@fremantlefoundation.org.au to request a copy to be sent to you.

The Fremantle Foundation from time to time includes information about its donors, fundholders and grants in newsletters, publications and on its website. In addition, donors and fundholders are named in approval letters to grant recipients and grant recipients are requested to acknowledge the Foundation and the relevant fundholder in material. Please indicate if you would prefer to remain anonymous.

- I would prefer for my fund to remain anonymous.

YOUR INVOLVEMENT WITH THE FREMANTLE FOUNDATION

We invite you to join the Fremantle Foundation's community of donors. Please indicate your interests below:

- I would like to receive invitations to the Fremantle Foundation's events, particularly for my nominated Impact Area/s.
- The Fremantle Foundation may acknowledge my Named Fund in its Annual Report and website.
- I am interested in being contacted about involvement in newsletter or website stories.

BEQUEST

- I would like to receive information about leaving a bequest to the Fremantle Foundation in my will.

CONTACT BY FREMANTLE FOUNDATION

When is the best time to contact you about your giving?

- Anytime
- End of Financial Year
- Start of Financial Year
- Other: _____

How often would you like the Fremantle Foundation to personally contact you throughout the year?

- 6 monthly
- Once a year
- Other: _____

Would you like to be on our Newsletter list? Yes/No

FORM 3: DONATIONS

INITIAL DONATION

I will make an initial unconditional donation of \$ _____ to Fremantle Foundation for my Named Fund by the following method.

Credit Card

Please charge my credit card:

Visa Mastercard American Express

Name on Card: _____

Card Number: _____

Expiry Date: _____

CVV: _____

Online

Please send me the link to make a payment online.

Direct deposit

Direct Deposits can be made with the following details:

Fremantle Foundation Trust

BSB: 633 000

ACC: 142 792 035

Ref: Your Fund Name

Cheque:

To make initial donation by cheque please forward this application, along with the cheque made out to "Fremantle Foundation Trust" to PO Box 1397, Fremantle WA 6959

ESTABLISHING A DIRECT DEBIT

Direct debits can be made with the following details:

Fremantle Foundation Trust

BSB: 633 000

ACC: 142 792 035

Ref: Your Fund Name

FORM 4: ADDITIONAL CONTACTS

NAME OF CHARITABLE FUND: _____

I/We request that Fremantle Foundation allow the following person/s to be Additional Contacts, with permission to:

(Please select one or both of the following options, as applies)

access statements about the Named Fund and receive information about the Fremantle Foundation and its events (subject to opting-out of receiving such information)

assume the role of the Named Fund Holder in nominating preferences where no Named Fund Holder remains involved (for example, due to death or incapacity)

Name: _____

Address _____

Suburb _____ State _____ Postcode _____

Email: _____

Phone: _____

Relationship: _____

(complete below if more than one additional contact)

Name: _____

Address _____

Suburb _____ State _____ Postcode _____

Email: _____

Phone: _____

Relationship: _____

Name: _____

Address _____

Suburb _____ State _____ Postcode _____

Email: _____

Phone: _____

Relationship: _____

Please inform each additional contact that you have nominated them.

Signature

Name

Date

Signature

Name

Date

Signature

Name

Date

NEXT STEPS

1. Return a completed Named Fund Establishment Form to the Fremantle Foundation via sue@fremantlefoundation.org.au
2. Make an initial donation.

Once we have received the form and the funds have been cleared, we will receipt your donation and be in immediate contact to provide all the support you need.

ACKNOWLEDGEMENTS

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- the Trustee may at any time cease to maintain a management account and account for the money and investments in the general accounts for the Trust Fund.