

Your charitable endowment

Making a lasting impact

Information brochure

Perpetual Foundation – Endowment Fund
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ABN 42 000 001 007 AFSL 236643



Why Perpetual?

Perpetual Group is one of Australia's most experienced investment and trustee groups, with an enduring passion for protecting and growing our clients' wealth.

Founded in Sydney in 1886, we have helped generations of Australians invest and manage their wealth through all market conditions.

Perpetual Group manages investment funds exceeding \$26 billion, administers over \$210 billion of client funds, and advises clients on over \$8 billion of investments (as at 30 June 2010).

Perpetual philanthropy

For over 100 years, Perpetual has helped individuals, families and companies contribute to the health and well-being of others through philanthropic endeavours.

Today, Perpetual is one of Australia's largest managers of philanthropic funds, including acting as trustee for over 450 charitable trusts with over \$1.1 billion in funds (as at 30 June 2010).

We have assisted in the establishment, investment and distribution of funds for medical, social, environmental, religious, cultural and educational purposes.

Our experience has given us a deep understanding of the needs of philanthropists, charitable and non-profit organisations, and professionals supporting these groups.

We are committed to helping donors and charitable organisations maximise their financial resources and develop sustainable giving programs.

Perpetual Foundation

In June 1998, we established the Perpetual Foundation to bring together the generosity of donors with our resources and expertise in managing and investing charitable funds.

The Foundation is a public charitable trust established in perpetuity to manage and distribute funds to charitable and community organisations. The rules of the Foundation are set out in its Declaration of Trust. The trustee of the Foundation is Perpetual Trustee Company Limited (see 'Important notes' on page 14 for further information and definitions).

The Foundation prudently invests with the aim of generating income to provide ongoing funding to eligible charities.

We can provide philanthropic research and advice to donors upon request. We conduct a rigorous grant-making process to ensure funds are effectively distributed and used as intended.

The Foundation is endorsed by the Australian Tax Office (ATO) as:

- a deductible gift recipient (DGR), which means that donations to the Foundation are tax deductible
- an income tax exempt fund which can make grants to a wide range of organisations that are registered as 'Item 1' DGRs
- having access to tax concessions including exemption from income tax, refund of any GST and the refund of franking credits on any franked income it receives.

Are you interested in changing lives for the better?

Do you want to give something back to your community?

Are you passionate about helping others?

Establishing your endowment within the Perpetual Foundation could be the answer.

You can have a positive impact on the lives of others without the administrative burden.

You can recommend the causes you wish to help.

You can be sure your donations will be carefully managed, prudently invested and used for the benefit of the community.

You can establish a legacy of sustainable funding for charitable causes.

You can make a lasting impact.

And **we can help you.**



'Having worked as a juvenile probation officer, I was keen to support youth close to where I now live in Victoria. My focus is Cottage by the Sea, which does amazing work with young people in need and their families. I regularly visit and have been involved in the committee over the years. I feel so proud to support this inspiring organisation each year which is making a real difference in my community.'

Virginia Defriest, The Defriest Endowment



'Being able to breathe on his own has been a major milestone for little Flynn. He stopped breathing at birth, and again when he was just two months old.

Flynn was diagnosed with a condition called laryngomalacia (soft larynx) and a narrow windpipe. Flynn is now being treated and is on the road to recovery.

The Beryl Maxwell Graham Family Memorial Endowment helped buy the paediatric bronchoscope for the Queensland Children's Respiratory Centre at the Royal Children's Hospital. In just six months this improved the treatment of over 500 children with serious respiratory illness, by allowing doctors to use a simple procedure to see inside a patient's airways.'

The Royal Children's Hospital Foundation, QLD

Why establish your endowment within the Perpetual Foundation?

Establishing your endowment within the Perpetual Foundation enables you to make a lasting difference to the lives of others without the administrative burden.

- **Simple.** All you have to do is make an initial donation now, and we'll establish the endowment (or you can nominate the Perpetual Foundation in your will and we'll establish the endowment at the appropriate time). You may request any name for the endowment. You don't have the expense or administrative burden of establishing and running your own charitable foundation.
- **Flexible.** As long as you meet the minimum requirements you can add to the endowment by donating as often as you wish, and so can your family, friends and colleagues. These donations will be attributed and tracked through a management account in the name of the endowment. The minimum initial donation is \$20,000 and the minimum additional donation is \$5,000.
- **Professional.** We handle all the administration, compliance and reporting for you. We also prudently invest the endowment capital to generate income and long-term capital growth.
- **Experienced.** As a leader in philanthropy for over a century, we can provide research and advise on how to maximise the endowment's positive impact. We have specialist expertise in research, grant making and investing for philanthropic purposes.
- **Involvement.** You can recommend the areas, organisations, or specific projects you would like the Perpetual Foundation to support and you can change your recommendations every year.

- **Tax effective.** Your donations are generally tax deductible up to the limit of your taxable income and can be spread over a period of up to five years. The Foundation itself is exempt from income tax and receives GST concessions and franking credit refunds on franked income it receives.
- **Enduring.** Your donations are invested to provide sustainable funding to charitable causes over generations.

Key features

- You request the name of the endowment
- The endowment is set up within 48 hours
- You pay no establishment fees
- You recommend the causes you wish to help
- You can be involved with your chosen cause or remain anonymous
- Your donations are tax deductible
- The money entrusted to the Foundation is prudently invested
- The Foundation pays no tax



Managing the endowments

Our service and support for each endowment includes:

- **Account administration.** We keep track of all aspects of an endowment, including capital and income, investment earnings and grants attributed to each endowment.
- **Investment.** The endowment is invested according to a specifically designed strategy to suit the needs and tax features of charitable funds. We invest in a diversified portfolio of assets with the aim of providing long-term capital growth and consistent income. The emphasis is on Australian shares which offer tax free entities such as the Foundation a refund for franking credits received, providing additional income for distribution to charities.
- **Grants.** We verify the eligibility of all recommended organisations before any payments are made. (See page 9 for further information about grants.)
- **Reporting.** Apart from providing donation receipts for tax purposes, we will provide a statement detailing your donations and the investment earnings and grants attributed to your donations. We will also send you a regular newsletter about what's happening in the world of philanthropy and invitations to philanthropic events.
- **Governance.** The Trustee has its own dedicated management committee to oversee the operation of the Foundation. The accounts of the Foundation are independently audited each year.



'I used to live in outback Queensland and learnt first hand the invaluable work of the Royal Flying Doctor Service and Careflight. I will never forget their dedication and professionalism, not to mention the gratitude of those they helped in remote areas. When I established an endowment within the Perpetual Foundation, I simply expressed my wish to support these organisations and Perpetual took it from there, managing everything for me.'

Anonymous donor

How to establish your endowment

Who is eligible?

Individuals (solely or jointly) who are over 18 years of age, companies, trusts, estates and other entities including associations, clubs and charities, are all eligible to establish an endowment.

What is the minimum initial donation?

The minimum initial donation is \$20,000.

How do I apply?

Simply complete the donation form attached to this brochure (following the instructions on page 13) and send your completed form and donation to your adviser or directly to us. We will send you a receipt for income tax purposes once your donation has been accepted.

Naming the endowment

On the donation form you are asked if you would like to request a name for the endowment. This can be your name, your family name, the name of a business or association, or in memory of someone: for example, the John Patterson Endowment, the Patterson Family Endowment, Patterson Catering Group Endowment, the Maisie Patterson Memorial Endowment.

Acknowledgement or anonymity?

All grants made to eligible charities attributed to your donations will acknowledge the name of the endowment unless you have requested anonymity. Most charitable organisations like to provide information to donors and may invite you to become involved in their programs and events.

Making additional donations

The minimum additional donation is \$5,000. Simply notify us in writing including the endowment name and account number, attaching a cheque to Perpetual Foundation for your additional donation.

Donations of non-cash assets

You may donate non-cash assets to the Perpetual Foundation, for example shares or real estate, as long as they are valued at over \$5,000. The assets may need to be valued by the ATO, which we can arrange.

Bequests from your estate

You may nominate the Perpetual Foundation in your will to receive the residual or specified amount of your estate or your estate executor may establish an endowment after you pass away. If you are considering providing a bequest from your estate you should obtain professional legal advice. We can assist you in this area or we can work with your solicitor in ensuring the clause is correctly worded in your will.

Nominating a successor

You may wish to nominate a family member, friend or other representative as your successor to take over your endowment and make recommendations after you die, or in the event that you suffer mental incapacity or other legal disability.

To nominate a successor, simply complete the 'successor nomination' section in your endowment donation form or advise us in writing.

Conditions

Once the endowment is established any donations received are irrevocable and not refundable. They are held by the Trustee of the Foundation and can only be granted in keeping with the Declaration of Trust of the Foundation. The Trustee has authority to invest and grant any endowment donations including any income earned.

If your endowment account has a balance of at least \$20,000, your nominated successor can continue to make grant recommendations after you die. If an endowment balance falls below \$20,000, we may merge it with another endowment or grant the balance to eligible organisations and close the account.

Grants for good

You are able to recommend the areas, organisations, or specific projects you would like the Perpetual Foundation to support.

Our experience over many years dealing with charitable and other community organisations means we are able to match your philanthropic interests with their needs. We conduct our own research using our extensive network in the philanthropic sector.

Our annual grant process involves reviewing around 1,000 detailed funding applications from charities all over Australia. This process focuses not just on the value of the charity or cause but places great emphasis on the quality of its leadership, governance and ability to achieve its objectives and make a lasting contribution.

Grant recipients

When you make your donation you can recommend the charitable or community organisations that you wish to receive grants and you can change your recommendations annually.

The beneficiary organisations must be deductible gift recipients and meet any other criteria we might establish. As Trustee of the Foundation we have ultimate discretion and authority over grants.

To be an eligible beneficiary the organisation must be both income tax exempt and an Item 1 DGR, which is an organisation that is entitled to receive income tax deductible gifts. DGRs are endorsed by the ATO or listed by name in the tax law. You can check if an organisation is an endorsed Item 1 DGR, or obtain a complete list of endorsed DGRs, by visiting www.abr.business.gov.au or phoning the ATO on 13 28 61. You can also obtain a fact sheet detailing DGRs listed by name in the tax law from the ATO's website at www.ato.gov.au. Please note that the Foundation is unable to provide grants from your endowment to other public or private ancillary funds.

Grants will not be made to any organisation which is providing a private benefit to the donor or an 'associate' (such as education tuition, dues, membership fees, tickets for charitable events, or

goods bought at charitable auctions). Grants cannot be used for lobbying or political contributions.

You may recommend a number of beneficiaries based on the value attributed to the endowment.

Value of your endowment account	Maximum number of grant recipients
Up to \$50,000	2
\$50,001 – \$100,000	4
\$100,001 – \$500,000	6
\$500,001 – \$2,000,000	8
Over \$2,000,000	10

You may change your grant recommendations at any time by completing an 'Endowment changes' form (which is available at www.perpetual.com.au or by contacting us) and sending it to us, or simply by writing to us.

You may also leave the selection of grant beneficiaries to our discretion as Trustee, or provide a general recommendation as to the type of beneficiary, for example medical research, environment or the arts.

You can write to us to nominate someone else to be your successor to make grant recommendations after you pass away.

Annual grants

Annual grants are normally made shortly before or after the end of each financial year from the income received during that year.

If the amount of the annual grant available for distribution attributed to an endowment is less than \$250 (which may be the case for recently established endowments) we may hold over granting this money to the next year.

Tax implications

We recommend you obtain professional tax advice before donating to establish an endowment. The following information is general only and should not be relied on for your personal circumstances.

Donations

General

Cash donations are generally deductible up to the limit of your taxable income.

Deductions for donations can be spread over a period of up to five years.

You may be denied a tax deduction for any donations made where due to any act, transaction, agreement, or scheme in relation to making that donation any of the following apply:

- an entity becomes liable to make a payment or transfer property, or becomes liable to suffer some detriment, disadvantage, liability or obligation
- you (or an 'associate' for the relevant purposes of the Income Tax Assessment Act) obtain, or may reasonably be expected to obtain some benefit other than the benefit of a tax deduction in respect of that donation
- the Foundation is liable to acquire some other property from you (or an 'associate').

Donations of non-cash assets

Donations of non-cash assets (such as real estate, shares or other securities), which you have owned for less than 12 months, are generally tax deductible for an amount equal to the lesser of the market value of the assets when the donation is made, or the amount you paid for the assets.

Donations of non-cash assets, which you have owned for longer than 12 months, are generally eligible to be claimed as tax deductions for the value of the assets as determined by the Commissioner of Taxation.

You may spread deductions in respect of donations of non-cash assets over a period of up to five years. This may be useful since donations generally are only deductible up to the limit of your taxable income in the year you make the donation. If you are considering donations of non-cash assets, in particular, you should obtain professional tax advice.

Bequests from your estate

Bequests from your estate may not be deductible for tax purposes but assets distributed as part of the administration of your estate may provide capital gains tax exemptions. If you are considering bequests from your estate you should obtain professional tax advice.

Grants to overseas organisations

Grants can be made to a foreign charitable organisation if it is a registered DGR, income tax exempt and based in Australia.

Fees and costs



The Estate of the Late Vera Agnes Fowler Endowment has supported the RSPCA Pearcedale Shelter, helping to fund operational costs including feed, animal attendant care and veterinary treatment for shelter animals.

Establishment of endowment and donations

There are no fees for establishing an endowment or making donations.

Trustee and administration fee

The annual trustee and administration fee is 0.67% pa of the balance attributed to an endowment. This covers all the costs associated with administering the endowment as part of the Foundation, including accounting, auditing, all aspects of the granting process, research and evaluation of eligible beneficiaries receiving grants, and reporting to regulatory authorities.

Investment management costs

Total estimated investment management costs are currently approximately 1.33% pa of each endowment balance. It is not possible to precisely quantify these management costs in advance, and they may vary in future due to factors including changes to allocations to underlying specialist investment managers and asset classes, as well as varying levels of performance fees. The total investment management costs include a management fee of 0.74% pa which is paid to the responsible entity of the underlying funds, which is currently a related entity of the Trustee.

Investment management cost estimates (excluding cash investments) are currently:

- management fees payable to the investment responsible entity – 0.74% pa
- estimated fees payable to underlying specialist investment managers – 0.56% pa (including estimated performance fees of 0.05% pa)
- estimated expense recoveries – 0.03% pa.

Any cash balance is invested in a cash management fund. The investment management cost of this fund is currently 1.05% pa. The management cost is payable to the responsible entity of the cash management fund, which is a related entity of the Trustee.

Payments to advisers

We may make payments to referral partners which may include financial advisers, Australian financial services licence (AFSL) holders, accountants, solicitors, or other referring parties, based on the total donations received via the referral arrangement. These payments, up to a maximum of 2% of the total of the donations received via the referral arrangement, are paid by Perpetual and not from the Foundation or any endowment.

Other service providers

There may be occasions where the Foundation is required to engage other service providers, such as a registered tax agent. In these instances, the costs will be met by the Foundation itself rather than by your endowment.

Additional information

Your privacy

Privacy laws apply to the handling of personal information by Perpetual. We collect personal information about you from your donation form to establish and support the ongoing administration of an endowment and to advise you of new developments relevant to the Perpetual Foundation or other Perpetual products. For legal reasons, if you do not provide us with your requested personal information we will not be able to process the donation form or administer an endowment for you.

Disclosure

We may disclose your personal information to external parties that provide services to us in relation to grants attributed to your donations (for example, providers of printing or postal services). We will disclose your personal information to the charitable or community organisations that are recipients of grants attributed to your donations unless you have requested anonymity. We also disclose information about the endowment to the adviser whose name appears on your donation form, unless you have requested us not to do so. Otherwise, we will not disclose your personal information to any other external parties unless required by law.

Access

You may be entitled to access all personal information which the Perpetual Group holds about you. You also have the right to ask us to correct information about you which is inaccurate, incomplete or out of date. If you would like access to your personal information or you have any questions please contact us. Our privacy policy is available at our website www.perpetual.com.au or by contacting us.

The Cassidy Bequest Endowment has helped the Salvation Army in Victoria to provide food hampers, shopping vouchers, furniture, assistance paying utilities and other essentials to families in need.



Completing your donation form

To establish an endowment please complete the donation form included with this brochure.

We have discretion to accept, limit or refuse any donation.

Further assistance

If you require any further information about the Perpetual Foundation – Endowment Fund, or would like assistance completing your donation form, please phone us on 1800 501 227 during business hours.

Lodging your donation form

You can lodge your completed donation form and cheque with your financial adviser, at any of our offices, or by mailing to:

Perpetual Foundation – Endowment Fund
Philanthropic Services
GPO Box 4172
Sydney NSW 2001

Who needs to sign the donation form?

Donor type	Sections to complete	Who should sign
I – Individual		
Sole individual	1A	Individual
Joint individuals	1A and 1B	Both individuals
C – Company	1C	For a company: <ul style="list-style-type: none"> two directors or a director and secretary or if the company has a sole director/secretary (please also tick the box above the applicant's signature in section 5), by that person or a representative authorised by the company. Companies can also sign under power of attorney.
P – Partnership	1A, 1B* and 1D	Partner(s)
T – Trust		
Individual trustees	1A, 1B* and 1D	If more than one trustee, all trustees should supply their details and sign. See 'Company' above.
Corporate trustees	1C and 1D	
O – Other entity (eg unincorporated association, club, charity)	1A, 1B* and 1D	Office bearer(s) – if more than one office bearer, all office bearers should supply their details and sign.

* Complete this section if more than one donor/trustee

Important notes

This information brochure (brochure) describes the arrangements for establishing an 'endowment' within the Perpetual Foundation ABN 41 069 508 398 (the Foundation). It also details policies, procedures and benefits associated with establishing an endowment, based on your donations, the share of investment returns and grants attributed to it.

References in this brochure to 'we', 'us', 'our', 'Perpetual', and 'Trustee' are to Perpetual Trustee Company Limited as the trustee of the Foundation.

Perpetual Trustee Company Limited is a wholly owned subsidiary of Perpetual Limited ABN 86 000 431 827.

'Perpetual Group' means Perpetual Limited and its subsidiaries.

References to 'you' and 'your' are to prospective donors.

Perpetual Investment Management Limited ABN 18 000 866 535, AFSL 234426, which is also a wholly owned subsidiary of Perpetual Limited, may be the responsible entity of underlying managed investment schemes that the Foundation invests in.

This brochure is not a product disclosure statement and does not constitute an offer to invest in the underlying investments of the Foundation. It contains general information only and is not intended to provide advice or take into account personal objectives, financial situation or needs. The information is believed to be accurate at the time of compilation and is provided by the Trustee in good faith.

All activities of the Foundation and donor participation in the endowment are subject to the terms and conditions contained in the Foundation's Declaration of Trust and this brochure. The Trustee can modify the program at any time according to the Declaration of Trust. We will send you a copy of the Declaration of Trust on request.

We recommend you obtain professional tax advice regarding your donations.

All amounts in this brochure are in Australian dollars and all times quoted are Sydney time (unless otherwise specified).

Unless otherwise stated, all fees and other costs disclosed in this brochure are inclusive of the net effect of goods and services tax.

Endowment donation

Please complete this form in black ink using BLOCK letters.

Do you want to add this donation to an existing endowment?

no yes endowment number:

1. Donor details (must be completed)

	individual	company	partnership	trust	other
Donor type (please tick one):	<input type="checkbox"/> I	<input type="checkbox"/> C	<input type="checkbox"/> P	<input type="checkbox"/> T	<input type="checkbox"/> O – see 'Completing your donation form' on page 13
1A. Donor 1 – Please tick one:					
title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	other <input type="checkbox"/>
first name(s)	<input type="text"/>				
last name	<input type="text"/>				
date of birth	<input type="text"/> / <input type="text"/> / <input type="text"/>				
1B. Donor 2 – Please tick one:					
title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	other <input type="checkbox"/>
first name(s)	<input type="text"/>				
last name	<input type="text"/>				
date of birth	<input type="text"/> / <input type="text"/> / <input type="text"/>				
1C. Company – (if applicable)	<input type="text"/>				
company name	<input type="text"/>				
1D. Entity – if you are opening this endowment on behalf of another entity (ie, trust/estate/partnership/unincorporated association), please complete this section. Enter trustee name(s) in 1A, 1B or 1C (above).	<input type="text"/>				
entity name	<input type="text"/>				
1E. Contact details					
residential address (mandatory)	<input type="text"/>				
suburb	<input type="text"/>			state	postcode
postal address (optional)	<input type="text"/>				
suburb	<input type="text"/>			state	postcode
phone (home)	<input type="text"/>				phone (business hours)
mobile	<input type="text"/>				fax
email	<input type="text"/>				

2. Endowment details (must be completed)

Name of endowment – For example, The Citizen Family
 The terms ‘fund’, ‘sub-fund’, ‘trust’ or ‘foundation’ should not be included in your endowment name.

 endowment

Joint donor authorisation

Complete for joint applications only (if no selection marked ‘either to sign’ will be assumed).

Grant recommendations and other account changes: either to sign both to sign

3. Irrevocable donation (must be completed)

Initial minimum donation \$20,000 – Please make cheque payable to:
 ‘Perpetual Trustee Co Ltd – [insert endowment name]’

donation \$

Please note that special procedures apply to donations of non-cash assets. Donors considering donations of non-cash assets or other property should contact Perpetual on 1800 501 227.

4. Grant recommendations – annual distribution of grants (optional)

Indicate below the charitable or community organisations you prefer to receive the annual grant from your endowment (total must equal 100%). Please provide your preferred grant recipient’s precise name(s) and address(es). For further information on which organisations are eligible, refer page 9. For additional grant recipients (maximum of 10 – depending on the value of your endowment) please attach a separate page.

A. Recipient charitable or community organisation									
name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ABN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
postal address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
suburb	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
state	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
postcode	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
annual grant percentage	<input style="width: 100%;" type="text"/>								%

B. Recipient charitable or community organisation									
name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ABN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
postal address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
suburb	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
state	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
postcode	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
annual grant percentage	<input style="width: 100%;" type="text"/>								%

You may instead make a general recommendation as to the type of grant recipient you would prefer (eg medical research, environment, arts, etc).

Type of grant recipient

Grants are accompanied by a letter which may include the donor’s name(s), address(es) and the endowment name, unless anonymity has been requested.

Do you wish to remain anonymous? yes no (if no selection marked ‘no’ will be assumed).

5. Successor nomination (optional)

Indicate below the details of the person you nominate to take over grant recommendations after you die, or in the event you suffer mental incapacity or other legal disability.

title	Mr	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Ms	<input type="checkbox"/>	other	<input type="checkbox"/>
first name(s)	<input type="text"/>							
last name	<input type="text"/>							
postal address	<input type="text"/>							
suburb	<input type="text"/>				state	<input type="text"/>		
phone (home)	<input type="text"/>				phone (business hours)	<input type="text"/>		
mobile	<input type="text"/>				fax	<input type="text"/>		
email	<input type="text"/>							

6. Acknowledgement and donor signature(s) (must be completed)

- I/We have read the attached brochure for Perpetual Foundation – Endowment Fund and agree to be bound by the provisions of the Perpetual Foundation’s Declaration of Trust and any other additional terms and conditions contained in this brochure.
- I/We understand that any donation once accepted by the Trustee represents an irrevocable donation to the Foundation and is not refundable to me/us.
- I/We certify that I/we, or my/our ‘associate’ will not receive any benefit, directly or indirectly, from the charitable or community organisations recommended to receive grants from my/our endowment.
- I/We understand that the Trustee decides which eligible charities will benefit from my endowment and is under no obligation to follow my/our recommendation.
- I/We agree that information about my/our endowment may be disclosed to my/our adviser unless I/we have ticked the box to the right.

Please tick if applicable: I am the sole director and sole secretary of the company.

signature	<input type="text"/>	date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
signature	<input type="text"/>	date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

COMPANY SEAL
(if applicable)

Contact details

Web

www.perpetual.com.au/philanthropy

Email

philanthropy@perpetual.com.au

Phone

1800 501 227

Fax

02 8256 1471

Postal address

Perpetual Foundation – Endowment Fund
Philanthropic Services
GPO Box 4172
Sydney NSW 2001

INVESTING FOR GENERATIONS

Perpetual 

Australian Capital Territory

Level 6, 10 Rudd Street
Canberra ACT 2601

New South Wales

Angel Place
Level 12, 123 Pitt Street
Sydney NSW 2000

Queensland

Level 6, 260 Queen Street
Brisbane QLD 4000

South Australia

Level 11, 101 Grenfell Street
Adelaide SA 5000

Victoria

Level 35, Rialto South Tower
525 Collins Street
Melbourne VIC 3000

Western Australia

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