

<<Web Form>>

Donor Preferences Form

Donor 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: _____

Email address: _____

Name of Fund / Management Account

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 Bass Coast Community 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 for 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 Bass Coast Community 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 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

Donor Granting Preferences

Date: _____

DONOR FUND 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 Bass Coast Community Foundation encourages making an ongoing impact towards the vital issues that it has identified in the community. Please tick any of the areas below you are interested in supporting.

- | | |
|--|--|
| <input type="radio"/> ABORIGINAL ORGANISATIONS | <input type="radio"/> ARTS & CULTURE |
| <input type="radio"/> EDUCATION | <input type="radio"/> FAMILY & COMMUNITY |
| <input type="radio"/> HEALTH & WELLBEING | <input type="radio"/> HOMELESSNESS |
| <input type="radio"/> YOUTH | <input type="radio"/> WOMEN & GIRLS |

ANNUAL DISTRIBUTION

The legal requirement is to grant a minimum of 4% of all Trust Funds managed by the Bass Coast Community Foundation Trustees each financial year to organisations or individuals undertaking charitable works aligned with the Foundation's strategic priorities and community needs.

PRIVACY POLICY

The Bass Coast Community Foundation's privacy policy is available online at www.bccf.org.au/privacy or you can email us at info@bccf.org.au to request a copy to be sent to you.

The Bass Coast Community 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 BASS COAST COMMUNITY FOUNDATION

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

- I would like to receive invitations to the Bass Coast Community Foundation's events, particularly for my nominated Impact Area/s.
- The Bass Coast Community 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 Bass Coast Community Foundation in my will.

CONTACT BY BASS COAST COMMUNITY 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 Bass Coast Community 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

ANYTHING ELSE

Is there anything else you would like us to know regarding your Preferences?

Donations Update

HISTORICAL DONATIONS

To the best of my knowledge, I have made donations to the Bass Coast Community Foundation Trust Fund to the (approximate) amount of:

I have an existing Named Fund called: _____

INITIAL / ADDITIONAL DONATION

I wish to make an initial/additional unconditional donation of \$ _____ to Bass Coast Community Foundation for my Named Fund by the following method and frequency.

Credit Card

Please charge my debit/credit card: Visa Mastercard

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:

Bass Coast Community Foundation Trust

BSB: 633 000

ACC: 118 762 418

Ref: Your Name / Fund Name

Cheque:

To make initial donation by cheque please forward this application, along with the cheque made out to "Bass Coast Community Foundation Trust" to PO Box 180, Wonthaggi VIC 3995

ESTABLISHING A DIRECT DEBIT

Direct debits can be made with the following details:

Bass Coast Community Foundation Trust

BSB: 633 000

ACC: 118 762 418

Ref: Your Name / Fund Name

Annually

6 monthly

Monthly

One Off

Other

Please sign here to authorise payment as outlined above _____

Date: _____

v.2022

Next Steps

1. Return these completed forms to the Bass Coast Community Foundation via info@bccf.org.au

Forms to complete and return include:

- Named Fund Donation Form
- Donor Granting Preferences
- Donations Update

2. Make an initial/additional donation.

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

ACKNOWLEDGEMENTS

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Thank you for your support of the work of the Bass Coast Community Foundation. Your donation(s) enable us to deliver our aims to:

- **Identify and address inequities and disadvantage through evidence-based early interventions**
- **Strengthen communities, increase resilience, well-being, and opportunities for Bass Coast residents**

If you would like any more information or would like the Executive Officer or any Director to contact you to discuss how you can be actively involved with our work, please email info@bccf.org.au or call 0493 110 802 anytime.

All donations over \$2 to the Bass Coast Community Foundation are deductible gifts under Item 2 Section 30 – 15 ITA 1997