



# NAMED FUND ESTABLISHMENT FORM

## WHO WE ARE

Hands Across Canberra is the national capital's community foundation. Since 2010, it has been working together with local for-purpose organisations on raising awareness in the community about need, has been an enabler for innovative partnerships and collaboration, and has worked hard to increase the level of giving and philanthropy in Canberra.

Hands Across Canberra is working to create broad community understanding of belonging as we seek to convince everyone in Canberra to act locally, to donate to local causes, to continue to volunteer in increasingly large numbers and to engage with our community.

Belonging is a product of positive action.

The three entities working together that make up Hands Across Canberra are: Hands Across Canberra Ltd, the Trustee Hands Across Canberra Trust (Public Ancillary Fund) and the Chief Minister's Charitable Fund. Together they form an integrated whole, aligned to the single purpose of supporting the Canberra community.

## OUR VISION

We envision a Canberra that is collaborative and generous, and where there is opportunity for all.

## OUR MISSION

Hands Across Canberra exists to support the community sector-for-purpose organisations that are the glue that bind our community together, supporting the most vulnerable through their vital work. Our work is built on three key principles, which informs everything we do:



**01 RAISING  
AWARENESS**



**02 CREATING  
PARTNERSHIPS**



**03 GIVING**

# FORM A:

## NAMED FUND ESTABLISHMENT

### NAMED FUND HOLDER DETAILS

First Name:	<hr/>		
Last Name:	<hr/>		
Organisation Name: (If applicable)	<hr/>		
ACN/ABN:	<hr/>		
Address:	<hr/>		
	Suburb:	<hr/>	
	State:	<hr/>	Postcode: <hr/>
Email Address:	<hr/>		
Contact Details	Home:	<hr/>	
	Work:	<hr/>	
	Mobile:	<hr/>	

### ESTABLISHMENT DONATION

#### INITIAL DONATION OF \$10,000 OR MORE

You can establish a NAMED FUND within the Trustee Hands Across Canberra Trust (Public Ancillary Fund) with an initial donation of \$10,000 or more. A NAMED FUND will build over time through regular donations or a bequest as well as through interest earnings. You may nominate eligible charities within your chosen impact area/s or preferred areas of interest to receive grants from your annual Granting Allocation.

I / We propose to make an unconditional gift to the Trustee Hands Across Canberra Trust (Public Ancillary Fund) (ABN 43661430024), starting with an initial donation of

\$ 

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### NAME OF CHARITABLE FUND

You may nominate a name for the NAMED FUND. This can be named after yourself, your family, a loved one, a business or a cause meaningful to you.

I / We request the Trustee Hands Across Canberra Trust (Public Ancillary Fund) establish a NAMED FUND within the Public Ancillary Fund, to form part of the Hands Across Canberra Trust.

I / We request that the NAMED FUND be named:

The 

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 Fund,  
(Please specify name)

# FORM A:

## NAMED FUND ESTABLISHMENT

### ACKNOWLEDGMENT AND SIGNATURE

I / We have read the NAMED FUND Terms (including the administration fees) and agree to be bound by them. Signed by the NAMED FUND holder/s:

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Signature

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Signature (if more than one authorised person)

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Name of NAMED FUND Holder

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Name of NAMED FUND Holder

---

Date

---

Date

### ACCEPTED BY THE TRUSTEE HANDS ACROSS CANBERRA TRUST (PUBLIC ANCILLARY FUND):

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Signature of Chief Executive Officer

---

Date

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Signature of Chair

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Date

# FORM B: PREFERENCES

## YOUR PHILANTHROPIC INTERESTS AND GOALS

Briefly describe what you would like to achieve through your NAMED FUND. What issues do you care about? Who in the community would you like to help? Understanding your areas of interest and funding priorities enables Hands Across Canberra to keep you informed about relevant issues, projects and events.

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## NOMINATE YOUR GRANTMAKING IMPACT AREAS

With the commitment of our donors like you, Hands Across Canberra is making a lasting impact on critical issues facing Canberra and the surrounding region. The Foundation's granting is focused on building the capacity of charities and driving innovative solutions through our work in the impact areas. The impact areas are available on our webpage at [handsacrosscanberra.org.au](https://handsacrosscanberra.org.au). Please advise us of your impact area/s of choice that best reflect your philanthropic goals. All NAMED FUND holders are required to nominate at least one impact area to which all or part of your annual Granting Allocation will be directed.

## YOUR PRIORITY IMPACT AREAS

1	<hr/>
2	<hr/>
3	<hr/>
4	<hr/>

## GRANTMAKING

### NOMINATING ELIGIBLE CHARITIES

If your NAMED FUND balance is \$10,000 or more at 30 June in the most recent financial year, you may nominate eligible charities to receive grants from your annual Granting Allocation as per the following table. Hands Across Canberra advises limiting the number of eligible charities you are supporting to maximise the impact of your grants.

#### FUND ACCOUNT BALANCE

\$10,000 TO \$49,999  
\$50,000 TO \$99,999  
\$100,000 TO \$249,999  
\$250,000 TO \$500,000  
\$500,000 OR MORE

#### FUND ACCOUNT BALANCE

Up to two charities  
Up to three charities  
Up to four charities  
Up to five charities  
Negotiable

## PRIVACY POLICY

Hands Across Canberra's privacy policy is available online at [handsacrosscanberra.org.au](https://handsacrosscanberra.org.au) or you can contact us to request a copy to be sent to you. NAMED FUNDS are named in grant agreement letters to grant recipients, and grant recipients are requested to acknowledge Hands Across Canberra and the relevant NAMED FUND in material that refers to the purpose of the grant. Please indicate if you would prefer your NAMED FUND to remain anonymous.

☐

I would prefer for my NAMED FUND to remain anonymous.

## YOUR INVOLVEMENT WITH HANDS ACROSS CANBERRA

We invite you to join Hands Across Canberra's community of donors. Please indicate your interests below:

☐

I would like to receive invitations to Hands Across Canberra events, particularly for my nominated impact area/s.

☐

Hands Across Canberra may refer to my NAMED FUND in its Annual Report and website.

☐

I am interested in being contacted about involvement in newsletter or website stories.

☐

I would like to receive information about leaving a gift to the Trustee Hands Across Canberra Trust (Public Ancillary Fund) in my Will.

## IDENTIFICATION CHECKLIST

Please provide 3 types of identification, i.e.: Driver license, passport, photo identification.

☐

Passport

☐

Medicare Card

☐

Other

☐

Driver Licence

☐

Photo Identification

These documents will not be required until your application has been approved.

# FORM C: DONATIONS

## INITIAL DONATION

I will make an initial unconditional donation of \$ \_\_\_\_\_ to the Trustee Hands Across Canberra Trust (Public Ancillary Fund) for my NAMED FUND by the following method:

☐

### CREDIT CARD:

Please charge my credit card:

☐

Visa

☐

Mastercard

☐

American Express

Name on Card: \_\_\_\_\_

Card Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Card Expiry Date: \_\_\_\_ / \_\_\_\_ CCV: \_\_\_\_\_

☐

### CHEQUE:

I will make a donation by cheque.

Payable to: the Trustee Hands Across Canberra Trust (Public Ancillary Fund)

Reference: Name of your NAMED FUND

☐

### ELECTRONIC FUND TRANSFER:

We can also accept donations by bank deposit/EFT. Please contact Hands Across Canberra for details.

## ESTABLISHING A DIRECT DEBIT

I would like to establish a regular monthly donation of \$ \_\_\_\_\_ to my NAMED FUND via my credit card:

### CREDIT CARD:

Please charge my credit card:

☐

Visa

☐

Mastercard

☐

American Express

Name on Card: \_\_\_\_\_

Card Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Card Expiry Date: \_\_\_\_ / \_\_\_\_

### START DATE:

I authorise Hands Across Canberra to deduct the above amount monthly from the above bank account / credit card on:

\_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Please specify date)

THIS SPACE IS  
INTENTIONALLY LEFT BLANK



# FORM D:

## ADDITIONAL CONTACTS NAME OF NAMED FUND

### INITIAL DONATION

I/We request that The Trustee of Hands Across Canberra 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 Hands Across Canberra 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).

Full Name: \_\_\_\_\_

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

Suburb: \_\_\_\_\_

State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Email Address: \_\_\_\_\_

Contact Details Home: \_\_\_\_\_

Work: \_\_\_\_\_

Mobile: \_\_\_\_\_

Relationship: \_\_\_\_\_

**(PLEASE COMPLETE BELOW IF MORE THAN ONE ADDITIONAL CONTACT AND INFORM EACH OF THEM THAT YOU HAVE NOMINATED THEM)**

Full Name: \_\_\_\_\_

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

Suburb: \_\_\_\_\_

State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Email Address: \_\_\_\_\_

Contact Details Home: \_\_\_\_\_

Work: \_\_\_\_\_

Mobile: \_\_\_\_\_

Relationship: \_\_\_\_\_

Full Name: \_\_\_\_\_

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

Suburb: \_\_\_\_\_

State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Email Address: \_\_\_\_\_

Contact Details

Home: \_\_\_\_\_

Work: \_\_\_\_\_

Mobile: \_\_\_\_\_

Relationship: \_\_\_\_\_

Signature

Signature

Name of NAMED FUND Holder

Name of NAMED FUND Holder

Date

Date

Please return your completed forms to  
PO Box 5519  
Kingston ACT 2604  
Hands Across Canberra

## CONTACT GENEVIEVE JACOBS

Chief Executive Officer on

0428 432 621

[gjacobs@handsacrosscanberra.org.au](mailto:gjacobs@handsacrosscanberra.org.au)



# NAMED FUND TERMS

Hands Across Canberra inspires and encourages accessible philanthropy by enabling donors to establish and build NAMED FUNDS to support positive and sustainable social change.

## WHY ESTABLISH A NAMED FUND?

NAMED FUNDS are an invaluable tool to assist donors to leave a lasting legacy of support to causes that they feel strongly about. They also facilitate group donations of family and friends and serve as a means through which parents can foster in their children philanthropic values, financial responsibility, increase social awareness and inspire future generations. In addition, donations made to a NAMED FUND are tax deductible and the income is tax exempt.

These Terms set out the ways that you may be involved with your NAMED FUND and how we will recognise your generosity.

We may amend these Terms from time to time; for example, to reflect changes in the law or to the granting practices. You can access these Terms on our website at [handsacrosscanberra.org.au](https://handsacrosscanberra.org.au).

The terms 'NAMED FUND holder', 'you' and 'your' refer to the Name Fund holder/s named in the Name Fund Establishment Form that forms part of the Hands Across Canberra Public Ancillary Fund.

## 1. WHAT IS A NAMED FUND ACCOUNT?

A NAMED FUND is a sub-account within the Trustee Hands Across Canberra Trust (ABN 43661430024), a public ancillary fund with Deductible Gift Recipient status. We will apply your donation, any further donations, and any investment income (the Property) towards your NAMED FUND and will account for it separately in our internal financial reporting. We will seek to hold the capital of your NAMED FUND in perpetuity (within legal obligations) and make grants of income each year to eligible charities within your chosen impact areas and areas of interest.

## 2. HOW MUCH DO I NEED TO DONATE TO ESTABLISH A NAMED FUND?

With an initial donation of \$10,000 or more you can establish a NAMED FUND.

We would also encourage you to consider making regular donations via our online donation portal which provides a quick, easy and secure way of contributing to your fund.

For further information on how to build your NAMED FUND, you can contact us to discuss easy and engaging ways for you to donate or to encourage family and friends to become involved in philanthropic fundraising and regular giving.

## 3. HOW WILL THE FOUNDATION MANAGE AND INVEST THE PROPERTY?

We will invest the Property in accordance with our investment policy which has ethical investment considerations.

Our investment policy is reviewed annually by the Board of Hands Across Canberra who are the Trustees and the Investment Committee. The Investment Committee meets regularly and includes experienced finance and investment professionals.

The nature of the tax-deductible status of the Trustee of Hands Across Canberra Trust means that your donations, once made, become the property of the Trust and cannot be refunded.

The Property will form part of the Hands Across Canberra Trust and does not form a separate fund or trust. This means that the Property will not be separately accounted for in the public statutory financial statements of the Trustee of Hands Across Canberra Trust.

## **4. WHAT IS THE PROCESS FOR MAKING GRANTS?**

### **GRANTS DECISIONS ARE MADE BY HANDS ACROSS CANBERRA**

All decisions about grants from NAMED FUNDS are approved by the Board following a due diligence process. When making grants, Hands Across Canberra selects organisations and projects based on our up to date know-how and extensive research into the current issues facing Canberra and surrounding region and shared learning with internal and external experts and community partners. Hands Across Canberra is committed to granting to projects which can demonstrate quality outcomes that can maximise their impact through: good governance, solid leadership, strong strategy, with a focus on improved sustainable outcomes for our community.

Through this process, Hands Across Canberra is well positioned to match your philanthropic objectives with suitable projects. We encourage you to contact Hands Across Canberra to discuss your philanthropic goals and, if relevant, to explore collaborative granting opportunities with us.

In making grants, we will consider the impact areas and particular areas of interest that you have indicated on this form to make your philanthropic vision a reality.

The management of donor requests in accordance with the paragraphs below is necessary for any donations to be tax deductible:

- (a) The Trust is not required to respond to any request or donor direction for a grant to be made to a particular not-for-profit organisation;
- (b) The Trust may invite the donor to make requests or indicate preferences at certain times but the Trust is not required to invite the donor;
- (c) The Trust may make grants from the funds from the donor's gifts along with other money in the Fund without first advising the donor or seeking a request.

### **ONLY ELIGIBLE CHARITIES MAY RECEIVE GRANTS**

We will grant the Property to eligible charities, being organisations that are endorsed by the Australian Taxation Office as both:

A. Tax Concession Charities, and

B. DGR Item 1 (Deductible Gift Recipient).

Our priority focus is on supporting local charities in Canberra, the ACT and surrounding region.

We will not make a grant unless we are satisfied that an eligible charity is reputable, is not in or at risk of being placed in receivership or at risk of revocation of their registration as an Australian Charity, or deductible gift registration endorsement, and/or charity tax concessions and that making the grant is consistent with our duties under Australian laws.

## EXCLUSIONS

Hands Across Canberra cannot provide retrospective funding, nor can it make grants to:

- Organisations that are not Australian registered charities
- Clinical research projects
- Endowment funds
- Recurrent expenditure where there is no plan in place for the long-term sustainability of the project or program
- Auspicing – the organisation recommended must be the one undertaking the program or project.

## WE GRANT A MINIMUM AMOUNT EACH YEAR

Each financial year, we determine a total amount to be distributed from the Trustee of Hands Across Canberra Trust (the Fund Distribution).

The Public Ancillary Fund Guidelines 2011 require the Trust to distribute a minimum amount each year which is currently set at 4% of the net value of the Trust Fund.

We attribute to your NAMED FUND an amount available for granting, based on the Fund Distribution and less any administration fees (the Granting Allocation).

Hands Across Canberra policy is to distribute the Granting Allocation in full each financial year.

## WE APPLY A PORTION OF GRANTS TO YOUR IMPACT AREAS

Hands Across Canberra's granting and strategic initiatives are focused on tackling the most important community needs – captured within our community consultation and reflected in the impact areas.

To learn more about the impact areas and the organisations who need our support, visit our website on [handsacrosscanberra.org.au](https://handsacrosscanberra.org.au). As the needs of the community change, we adjust the impact areas to continue to address key issues within our community.

We encourage you to nominate the impact areas that best reflect your philanthropic goals.

## 5. WHAT INFORMATION AND RECEIPTS WILL I RECEIVE?

Hands Across Canberra will provide you with an annual statement on the investments, administration fees and grants attributed to your NAMED FUND.

We will issue tax deductible receipts for the value of your initial donation, and any additional donations.

## 6. WHAT IS THE ANNUAL ADMINISTRATION FEE?

Hands Across Canberra charges minimal fees to strike a balance between the Funds commitment to accessible and cost-effective philanthropy and ensuring the ongoing sustainability of the organisation.

Hands Across Canberra's current annual administration fee is set at 0.5% of net carrying value at beginning of financial year.

There is no fee to establish the NAMED FUND. The annual administration fee assists the Trust to operate efficiently and effectively, ensuring fiscal responsibility, due diligence, donor education, research, reporting and compliance and other activities.

Fees are set by the Trustees Hands Across Canberra Trust, who may decide to vary the administration fee over time to reflect increases to the costs of managing the Trust.

## **7. CAN I NOMINATE ADDITIONAL CONTACTS?**

We will consider your requests to allow one or two representatives, such as family members, to:

- access statements about your NAMED FUND and receive information about Hands Across Canberra and its events, and/or
- assume the role of NAMED FUND holder in nominating preferences where no NAMED FUND holder remains involved (for example, due to death or incapacity).

We may ask additional contacts to acknowledge these Terms before expressing granting preferences.

## **8. WHAT HAPPENS IF MY NAMED FUND FALLS DORMANT?**

We may consider your NAMED FUND to be dormant if:

- we have not had contact with you, or a person nominated by you, for a period of five years or more; or
- the balance of your NAMED FUND is less than \$10,000 and you have made donations of less than \$1,000 over the last five years.

If your NAMED FUND falls dormant, we will continue to honour your generosity and ensure your donations have a lasting impact. We will make grants based on your philanthropic goals.

## **9. CAN I FUNDRAISE FOR MY NAMED FUND ACCOUNT?**

Yes but please contact us prior to undertaking any fund raising activities.

When marketing a NAMED FUND it is important that you first consult with us and understand your legal obligations.

## **10. CAN I USE THE TRUST NAME AND LOGO?**

Please contact us to seek approval prior to printing and distribution of any public materials containing our logo or wording about Hands Across Canberra in relation to your NAMED FUND.

## **11. PRIVACY**

The information you provide to us is used to establish and manage your NAMED FUND.

With your consent, we may refer to your NAMED FUND by its name in our promotional materials and publications, including our annual Impact Report.



**Hands  
Across  
Canberra**  
Your Community Foundation



We welcome the opportunity to discuss how Hands Across Canberra can help you fulfil your philanthropic vision.

**Contact Genevieve Jacobs**

Chief Executive Officer on  
**0428 432 621** to discuss this matter further.

**HANDS ACROSS CANBERRA**

0428 432 621

[gjacobs@handsacrosscanberra.org.au](mailto:gjacobs@handsacrosscanberra.org.au)

PO Box 5519

Kingston ACT 2604

[handsacrosscanberra.org.au](http://handsacrosscanberra.org.au)

ABN: 43 661 430 024

