
Supporting Documentation

Below is a list of documents that will be required for your application.

If you do not provide these documents your application could be considered non-compliant.

We suggest you prepare and have these documents available prior to starting your application.

Certificate of Incorporation

- A copy of your organisation's certificate of incorporation provides us with evidence that the organisation is bona fide.
- This can be found online at societies.govt.nz
- Schools do not need to provide this.

Please name the upload **Certificate of Inc**

Charities Commission Registration

- A copy of your organisation's certificate of registration if applicable.
- This can be found online at charities.govt.nz
- Schools do not need to provide this.

Please name the upload **Charities Registration**

Letter of Affiliation

- This is only required if your organisation is a sports club or belongs to a national / regional body.
- The affiliation letter **must be less than 12 months old** from the date you submit your application.
- Please include a copy of the certificate of incorporation and/or charities registration and constitution for the national / regional body.

Please name the upload **Letter of Affiliation**

Cover Letter

- Provide a description of the organisation to give us an understanding of what your organisation does and how it benefits the community. This can be either in the form of a letter (use the organisation letterhead if you have one) or any promotional material you may have.
- We are interested to know the areas your organisation covers, the beneficiaries of your work, the organisational structure and governance, and how the funds applied for will benefit the community.
- The more information you provide on the project the better understanding we have of the benefits to the community.

Please name the upload **Cover Letter**

Pre-printed Deposit Slip for the Organisation's bank account

- The deposit slip or statement must match the legal entity name of the organisation applying for funding.
- If you do not have a pre-printed deposit slip, then you can provide bank generated account details verified by the bank (**must be less than 12 months old** from the date you submit your application)

Please name the upload **Deposit Slip**

Financial Statements/Set of Accounts

- Must provide of a copy of the Organisation's most recent audited Financial Statements/Set of Accounts that refer to the last full Financial Year
- Must include Performance Report (Income Statement or Statement of Financial Performance)
- Must include Position Report (Balance Sheet or Statement of Financial Position)
If the above information is not available, we may accept the following:
- Set of Accounts that are not audited
- Organisation's Bank Statements from the last 3 months

Please name the upload **Financials**

Full Copy of the Meeting Minutes

A full copy of the meeting minutes confirms the organisation's board/executive committee have endorsed to apply to Trillian Trust for funding.

- If the full copy of meeting minutes are **not** signed you must also include a separate resolution pertaining only to the decision to apply to Trillian Trust this must be signed and dated certifying is as a true and correct record by **two** Executive Board Members (not the minute-taker secretary).

The Full Copy of Meeting Minutes must include the following information:

- Must be an official letterhead from the Organisation
- Must include a statement that a decision has been made to apply to Trillian Trust Ltd for a grant.
- Must include the date the decision has been made (must not be more than 3 months old from the date of application submission)
- **Must state the requested dollar amount**
- Must state what the fund will be used for
- Must confirm that the resolution is a true and correct record of the decision
- **must be signed by two Executive Board Members (not the minute-taker secretary).**

If the resolution has been endorsed **via email or other electronic correspondence**, a resolution signed and dated by **two** Executive Board Members must still be provided alongside **ALL** correspondence endorsing the decision.

Please name the upload **Meeting Minutes**

Endorsement from the Principal

- If you are applying from a school, please provide a letter from the Principal endorsing this application.

Please name the upload **Principals Letter**

Declaration of Consent

- Trillian Trust have their own declaration of consent within the application (Step 8).
- You must download the declaration of consent, print, read and must be signed and dated by two executive board member/authorised people.
- The declaration of consent must be signed and dated by two executive board members within 4 weeks prior of the application submitted date.
- A new declaration of consent must be signed and dated with every new application that you submit.

Quotes for Requested Funding

Quotes are used in our assessment process to ensure the costs of the goods and/or services are competitive and at the appropriate market rate.

- We require at least two competitive quotes (from different suppliers) for each item being applied for.
- Where you cannot get more than one quote for the goods and/or services please include an explanation as to why.
- The quotes should be detailed and list each item being purchased and any additional fees such as labour or freight.
- The quotes provided must clearly identify the supplier and their contact details. Personal emails will not be accepted.
- The quotes must clearly identify whether the amount is GST inclusive or exclusive, regardless of whether the supplier is GST registered or not.
- The quotes must **NOT** be more than three months old from the date you submit your application.
- Quotes must be date valid – check the supplier terms on the quote to ensure the quote has **NOT** expired.
- **We do not accept website/print screens as quotes.**
- If you cannot provide a second or competitive quote, you must provide a Written Explanation as to why there is only one quote. Even if you have been using your preferred supplier for a number of years, we still require a competitive quote.

Please name the uploads Preferred Quote / Competitive Quote

Wages/Salaries/Job Description/Employment Contract

- Applications for wages/salaries are considered on a case by case basis and are considered as a low priority for Trillian Trust.
- Please provide a current copy of the job description and a signed and dated employment contract.
- Employment Agreement must be signed by both the Employer and Employee
- Must provide any signed variation letters that show amendments if applicable

Please name the uploads Job Description 'Name' / Employment Contract 'Name'

Proof of Event/Names and Roles of people travelling

- If your application involves costs for team travel and event costs, please upload proof of the flyer/invite/entry form and names and roles of people travelling.

Please name the upload Event Details / Names & Role