



The Harveys Stepping Stone Foundation REQUEST FOR GRANT

PLEASE COMPLETE all sections of this form and return directly to Harveys Stepping Stone Foundation. Use the checklist provided to ensure that all relevant information is attached. If this form is not completed in full, the application will be returned to the applicant without being considered by the Foundation Trustees.

NAME & ADDRESS OF APPLICANT:

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DETAILS OF CONTACT PERSON:

Full Name(s):..... (Mr/Mrs/Ms)

Telephone:..... Fax:.....

Address:.....

Email Address:.....

WHAT IS THE GRANT TO BE USED FOR? (Please be specific)

This section must be completed, with supporting information/letters/documents attached.

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WHO WILL BENEFIT FROM THIS GRANT AND HOW? (Please be specific)

This section must be completed, with supporting information attached.

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Important Information Regarding Grant Applications

The HARVEYS STEPPING STONE FOUNDATION is a Charitable Trust and is prepared to consider applications from individuals in New Zealand that conform to the charitable and authorised purpose of the HARVEYS STEPPING STONE FOUNDATION

Use of Proceeds

The HARVEYS STEPPING STONE FOUNDATION'S authorised purpose is set out on the Harveys website: www.harveys.co.nz

Foundation Trustees will meet twice yearly (May and November) but will also consider applications received during the intervening periods. Grant applications must be received 14 working days prior to a grants meeting. Applicants will be notified of the outcome of their application in writing within 5 working days.

Grant payments will be made by cheque via a supporting Harveys office in the applicants area. The Harveys representative will make contact to arrange presentation of the grant.

Terms & Conditions

The HARVEYS STEPPING STONE FOUNDATION is under no obligation to meet any funding request made. The funds belong to the HARVEYS STEPPING STONE FOUNDATION, which has the final say on whether a grant is approved.

All grant applications must be made on this form and sent to the HARVEYS STEPPING STONE FOUNDATION for consideration. All applications are subject to the availability of funds.

All grants are given free of any commercial consideration. No fee or commission payment of any kind is attached to this application.

Grant applications must not be retrospective. Applications must be future-focused and lodged prior to the event / project taking place.

The application MUST be sighted and signed by a notary public or Justice of the Peace, otherwise it will not be considered by the Foundation Trustees and the application will be returned to the applicant.

Conditions of Fund Allocation

The HARVEYS STEPPING STONE FOUNDATION requires that audit information in the form of paid invoices be returned once funds have been spent. It is a condition that the funds will be used for the purpose applied for and that acceptance of the payment will be deemed to confirm that the allocation has or will be applied accordingly.

The allocation is made as a donation, being an unconditional gift from Trust funds and on the condition that no procurement fee, commission and/or discount has or will be paid to any person and that no identifiable benefit arises or may arise in the form of a supply of goods or services to any party involved as a result of the payment being made.

The applicant acknowledges and accepts that public disclosure will be made of all applications received and monies allocated by the Harveys Stepping Stone Foundation.

- 1) **In the event of non-compliance with any of these conditions, an amount equal to the amount of the allocation is immediately repayable by the recipient to the Foundation.**
- 2) **Records are subject to audit. All funding requests include consent to audit of the recipient account to verify receipt and correct use of funds.**

GRANT AMOUNT BEING REQUESTED:

\$.....

PLEASE SUPPLY A COST BREAKDOWN TOGETHER WITH COPIES OF AT LEAST TWO COMPETITIVE QUOTES (attach documentation as necessary):

..... \$.....

..... \$.....

..... \$.....

HAVE FUNDS BEEN APPLIED FOR FROM ANOTHER SOURCE? If so, please provide details:

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BANK ACCOUNT DETAILS:

Please **attach** a printed deposit slip, in the name of the applicant.

DATE:

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I/WE THE UNDERSIGNED, MAKE A SOLEMN DECLARATION CONSCIENTIOUSLY BELIEVING THE SAME TO BE TRUE UNDER AND BY VIRTUE OF THE OATHS AND DECLARATIONS ACT 1957. I/WE DECLARE THAT:

- i. The information provided in this application form is true and correct to the best of our knowledge.
- ii. We have the authority to make this application on behalf of the applicant (if the applicant is not a natural person).

Signature of application representative:

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Signature of application representative:

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SIGNATURE OF PERSON AUTHORISED TO TAKE A DECLARATION: e.g. Lawyer/Notary Public/JP

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FOR HARVEYS STEPPING STONE FOUNDATION USE:

| | | |
|---|---|---|
| Grant No.: <input type="text"/> | Grant Amount: \$ <input type="text"/> | Date of Grant Approval: <input type="text"/> |
| Cheque No: <input type="text"/> | Date of Grant Provision: <input type="text"/> | Supporting Harveys Branch Signature: <input type="text"/> |



CHECKLIST

HAVE YOU REMEMBERED EVERYTHING?

Please ensure that all information is attached to the grant application before it is forwarded to the HARVEYS STEPPING STONE FOUNDATION:

- Complete all sections of the form.
- Provide a contact name and telephone number where the contact person is easily accessible.
- Attach copies of competitive quotes (at least two) or other evidence to support the funding request such as letters of referral, supporting documents from medical practitioners etc. Quotes must not be more than one month old.
- Attach a printed deposit slip or bank account verification in the name of the applicant.
- It is vital that the application has been sighted and signed by a JP or notary public (including their official stamp) otherwise the application will be returned to the applicant.

Please contact the HARVEYS STEPPING STONE FOUNDATION if you have any queries about this form or the information required.

*** If this form is not completed in full, it will be returned to the applicant without being processed ***

Contact / Postal Details

The Harveys Stepping Stone Foundation
Level 4B, 34 Mahuhu Crecent
Auckland 1010

The Harveys Stepping Stone Foundation
PO Box 37906
Parnell
Auckland 1151

Telephone: 09 375 7550

Facsimile: 09 375 7555

Email: steppingstone@harveys.co.nz

Website: www.harveys.co.nz (click on the Stepping Stone link)