

## **Theodore and Isabella Wearne Charitable Trust Inc.**

### **Guidelines for Applications for Financial Assistance for Individuals**

The Theodore and Isabella Wearne Charitable Trust Inc. (**The Trust**) provides financial assistance to West Australians in need, particularly children and the elderly.

Please read these guidelines before you complete the Theodore and Isabella Wearne Charitable Trust Financial Assistance Application Form for Individuals.

#### **APPLICATIONS MUST BE SUBMITTED BY A REPRESENTATIVE.**

**ONLY APPLICATIONS SUBMITTED THROUGH THE WEBSITE APPLICATION FORM WILL BE CONSIDERED. WRITTEN APPLICATIONS THAT ARE COMPLETED AND EMAILED WILL NOT BE CONSIDERED.**

#### **Definitions**

**“Recipient”** means the individual who will receive the benefit of a successful application.

**“Representative”** means an individual working or volunteering with an organisation such as a social welfare, charitable or other similar organisation which is assisting a Recipient.

**“Relevant Person”** means:

- 1) any person that ordinarily resides in the Recipient’s household (excluding any person who pays rent or board to the Recipient); or
- 2) any person upon whom the Recipient is financially dependent.

**“Income and Expenditure Form”** is where the Representative fills in the fortnightly expenditure on the items listed.

Assets and Liabilities Form definitions are:

**“Assets”** means total value of each item owned as per list or other items not listed

**“Liabilities”** means total amount owed on each item (fortnightly payments towards these items recorded in the Income and Expenditure form)

#### **What I can get assistance for?**

Financial assistance may be provided for, but not limited to:

- Digital devices
- Mobility Equipment
- Medical equipment
- Sensory equipment
- Beds and bedding
- Basic items such as clothing, bedding, and education costs
- Utility bills and rent
- Basic items of furniture
- Assistance for adults or children who are sick, disadvantaged or who have special needs
- Security
- White goods for regional areas. For metropolitan area whitegoods – these must be applied for through The Salvation Army White Goods Program
- Other assistance as determined by The Trust

**Financial assistance is not provided for:**

- Land or building projects
- Salaries or administrative costs
- Overseas travel
- Organisations
- Research
- General or cash donations
- Retrospective funding
- Funeral Costs

**Applications for White Goods within the Perth Metropolitan Area**

Applications for white goods such as washing machines and refrigerators, to be supplied within the Perth Metropolitan Area, can be made to The Salvation Army White Goods Program, which is administered on behalf of the Wearne Trust. Address details as follows:

Captain Dianne Gibbons  
Doorways Support Officer  
[dianne.gibbons@salvationarmy.org.au](mailto:dianne.gibbons@salvationarmy.org.au)  
(08) 9260 9513

WA Divisional Office  
333 William Street Northbridge, WA 6003  
Mail: PO Box 8498, Perth Business Centre WA 6849

**How to Apply:**

- Applications must be submitted by the 1<sup>st</sup> business day of the month to be considered at that month's meeting. Late applications received after the first business day of the month will be held over to the following month's meeting.
- **Applications received without all the required information will not be considered.**
- Applications must be made using the *Theodore and Isabella Wearne Charitable Trust Application for Financial Assistance for Individuals Form* accessed via our website and be completed by a Representative.
- The application form must be completed with the following information included or attached:
  - Quotes. For items less than \$200, one (1) quote is required, for items equal to or greater than \$200, two (2) quotes are required for each item requested and should be for an item of similar description. The quotes must be less than three (3) months old and include freight and installation charges, if applicable. Mitigating circumstances which prevent this may be considered by The Trust.
  - All quotes are to be in the name and address of the recipient. If not able to provide the address, please provide a reason.
  - **All Quotes or Invoices must include the BSB and Account Details of the Supplier**
  - Where the item requested is equipment to be installed into a rented home, a letter of approval from the landlord is required, allowing installation and noting any restrictions.
  - Included in the letter from the landlord is a statement as to the length of time of the tenant's residence at the property and a recommendation by the landlord.
  - Where more than one item is requested, the items should be prioritised by the Recipient.
  - Relevant supporting letters from professional sources applicable to the application, eg. Medical Practitioner, Dentist, Teacher, Occupational Therapist, Speech Pathologist.

- The supporting letters should:
  - be less than three (3) months old
  - include information relevant to the child/person's diagnosis (or lack of diagnosis), the child/person's prognosis, symptoms and effects of their diagnosis on the quality of life of the child/person and their family
  - include how the recommended item is beneficial to the child/person, and
  - give an indication of the urgency of the financial assistance
- Current financial information about the child/person's family.
- The Wearne Trust *Income & Expenditure Statement* and *Assets & Liabilities Statement* **must** be completed for the application to be considered by The Trust.
- Utility bills and statements of rent owing must be less than three (3) months old.
- Government assistance documentation such as Centrelink Statement.
- Payment details for the supplier must be included or the application will not be processed.

**What happens next:**

- The Trust's board meet each month to consider applications for assistance.
- The distribution of the Trust's available income is at the sole discretion of the Board and its decisions are final. No correspondence or discussion will be entered into relating to those decisions.
- All Recipients will be notified by email regarding the outcome of their application. Unless a time extension has been requested, financial assistance will expire three (3) months after the date of notification.

**Once a grant is approved:**

- Funds will be paid directly to suppliers on invoice or to the Representative.
- Payment will NEVER be made directly to a child/person or their family, nor will cash payments be made.
- Once the equipment has been delivered, the ownership is transferred directly from the supplier to the child/person or their family (if applicable).
- The funds granted by The Trust cannot be used for any other purpose or item, without the prior consent of The Trust.
- If the equipment/financial assistance is no longer required or suitable prior to being purchased, the application must be withdrawn, and a new application may be submitted immediately for consideration at the next board meeting.
- Receipts from suppliers must be provided to The Trust no later than 14 days after the equipment/goods/services are purchased or financial assistance has been provided.

**How often can I apply for assistance?**

- A Recipient can only make one application for assistance in any twelve (12) month period.
- Where a Recipient's application for assistance is successful, that Recipient cannot apply for another grant for a fixed period of twelve (12) months from the date of the successful grant being made.
- Where a Recipient's application for assistance is not successful that application cannot be made again at any time, but that Recipient may apply for something different after the expiry of twelve (12) months from the date of refusal of the unsuccessful application.

**Role of the Representative:**

The Representative making the application must:

- Ensure when the financial assistance is provided it is promptly used for the purpose for which it has been given.
- Provide the Wearne Trust with receipts from suppliers no later than 14 days after the goods are purchased or payment is made for services. It is a requirement of The Trust's auditors that these receipts are obtained. **Failure to do so may result in future applications not being considered.**

**Recipients and Representatives must not contact The Trust to find out if an application has or has not been successful. Representatives will be advised of outcomes by email in due course.**

**ONLY APPLICATIONS SUBMITTED THROUGH THE WEBSITE APPLICATION FORM WILL BE CONSIDERED.**

## Wearne Trust Income and Expenditure Statement (Per Fortnight)

“Income and Expenditure Form” is where the Representative fills in the fortnightly expenditure on the items listed.

<b>INCOME</b>	<b>\$</b>	<b>Education</b>	<b>\$</b>
Wage/Pension 1		School/University/Course Fees	
Wage/Pension 2		Uniforms/Books/Stationery	
Government / Family Payment		Child Care	
Board/Rent		<b>Personal</b>	
Child Support		Clothing/Shoes	
Other Income		Toiletries/Cosmetics	
<b>Total Income</b>		Entertainment: Going Out	
<b>LIVING EXPENSES</b>		Entertainment: Streaming / Pay TV	
<b>Housing</b>		Alcohol	
Rent/Mortgage		Cigarettes	
Utilities: Water		Personal Spending (includes Lotto/Gambling)	
Utilities: Gas		Memberships/Other Fees	
Utilities: Electricity		<b>Other Payments</b>	
Home Phone / Internet		Child Support	
Mobile Phone		Tax Debts	
Home Maintenance		Fines	
<b>Transport / Vehicle</b>		Union Debts	
Car Payments		Union Fees	
Car Expenses		Centrelink Repayment	
Fuel		Credit Card 1	
Public Transport		Credit Card 2 + more	
Taxi / Rideshare (eg: Uber)		Store Account 1	
<b>Groceries</b>		Store Account 2	
General Groceries (Food)		Personal Loan 1	
Household Items		Personal Loan 2	
Dining Out		LayBy/Afterpay	
Take-away Meals		Other Loan(s)	
<b>Medical</b>		Other Court Ordered Payment(s)	
Health Insurance/Ambulance			
Doctor/Specialist/Dentist		<b>Sub Total (2)</b>	
Allied Health (Physio/Chiro etc)		<b>Sub Total (1)</b>	
Chemist/Medications		<b>Total Expenditure</b>	
Visual Aids (glasses/contacts)			
		<b>Net Surplus (or Shortfall)</b>	
<b>Sub Total (1)</b>		(Total Income minus Total Expenditure)	

## Wearne Trust Assets and Liabilities Statement

<b>ASSETS</b>	Total value of each item owned
House	
Household Effects	
Farm	
Car(s)	
Motor Bike(s)	
Boat	
Other Property	
Shares	
Bank Deposits/Savings	
Cash	
<b>TOTAL</b>	

<b>LIABILITIES</b>	Total amount owed on each item (fortnightly payments towards these items recorded in the Income and Expenditure form)
House	
Farm	
Car(s)	
Motor Bike(s)	
Boat	
Other Property	
Credit Card	
Loan 1: _____	
Loan 2 +: _____	
Other Debt(s): _____	
<b>TOTAL</b>	

