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's form "Application for Financial Assistance for Individuals" on the website.

APPLICATIONS MUST BE SUBMITTED BY A REPRESENTATIVE.

ONLY APPLICATIONS SUBMITTED THROUGH THE WEBSITE (www.wearnetrust.org.au) USING THE ONLINE APPLICATION FORM WILL BE CONSIDERED. NO OTHER APPLICATIONS WILL BE CONSIDERED.

Definitions

"Applicant" means the individual (or where relevant the parent/guardian of 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 an Applicant.

"Relevant Person" means any person:

1) living in the house occupied by the Applicant (excluding any person who is just a boarder); and
2) who is either dependent on the Applicant or is a person upon whom the Applicant is financially dependent.

"Income" means

1) average fortnightly income from all sources (eg. pension, allowances, wage, child support, board, rent); and
2) where the Applicant is under 18 and not living independently then also includes the Applicant's parent/guardian income.

"Expenses" means:

1) estimated average fortnightly expenses (NOTE that fortnightly payments towards any debts must be listed); and
2) where the Applicant is under 18 and not living independently then also includes the Applicant's parent/guardian expenses.

"Assets" includes any item owned by the Applicant, owned by a Relevant Person or jointly owned by them.

"Liabilities" means all debts owed by the Applicant, owed by a Relevant Person or jointly owed by them.

What can I get assistance for?

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

- Assistance in providing items to assist persons who are elderly, children, disabled, sick, disadvantaged to meet special needs
- Providing essential items to persons in need including:
  - Beds and bedding
  - Clothing
  - Digital devices
  - Education costs
  - Essential items of furniture
  - Motor vehicle repairs
  - Security devices
  - Utility bills and rent assistance
  - White goods:

    - Applicants living in regional areas apply on-line.
    - Applicants living in the metropolitan area must apply to The Salvation Army White Goods Program (see below).
- Assistance with health treatment and appliances to persons in medical need including:
    - Essential heating/air-conditioning appliances
    - Mobility Equipment
    - Medical equipment
    - Medical and dental treatment
    - Specialised household items
    - Sensory equipment
- Other assistance as determined by The Trust

Financial assistance is not provided for:

- Land or building projects
- Salaries or administrative costs
- Overseas travel
- Membership of organisations
- Research
- General or cash donations
- Retrospective funding of expenses already paid by Recipients
- Funeral Costs
- Council Rates
- Tenant's liability for property damage

Applications for White Goods within the Perth Metropolitan Area

Applications for whitegoods such as washing machines and refrigerators, to be supplied within the Perth Metropolitan Area, must be made to The Salvation Army White Goods Program, which is administered by the Salvation Army using funding from the Wearne Trust. The Salvation Army White Goods Program contact details are:

Lindsay Boyer
State Manager – Doorways WA
The Salvation Army Australia Territory
Mob: 0457 409 878
PO Box 317 Morley WA 6943
Email: Lindsay.boyer@salvationarmy.org.au

HOW TO APPLY TO THE TRUST

REQUIRED FORM OF APPLICATION

- Applications must be made online through the link on the *Theodore and Isabella Wearne Charitable Trust* website.
- Applications must be completed by a Representative with as much of the information and details required as can reasonably be obtained from the Applicant.
- The *Statement of Household Income and Expenses* and the *Statement of Assets and Liabilities* which are a requirement of the online application **must be completed in as much detail and as accurately as possible**
- Where more than one item is requested, the items should be prioritised by the Applicant.
- The Representative should outline the Applicant's background and reason for applying for assistance.

REQUIRED SUPPORTING INFORMATION

- The application form must be completed with the following information included or attached:

QUOTES (if requesting purchase of an item or supply of a service)

- **Quote for items less than $200**, **1 quote** is required.
- **Quotes for items equal to or greater than $200**, **2 quotes** are required for each item requested and should be for an item of similar description from two different suppliers.
- Screen shots or photos of a supplier's website **will not** be accepted as a quote.
- All quotes must be **less than 3 months old** and include freight and installation charges, if applicable.
- All quotes must be addressed to the **name and address of the proposed Recipient**. If not able to provide the address, please provide a reason.
- All quotes must include either the **BSB and Account Details of the Supplier OR BPay details of the Supplier.**

○ **PAYMENT DETAILS (for all applications)**

- Applications **must** include details of the BSB and Account Details of the supplier, service provider, utility service or landlord.
- Payments from The Trust are not made to the individual Applicant, they are made direct to the supplier, service provider, utility service or landlord.

○ **REQUESTS TO PAY BILLS OR RENT**

- A copy of all bills and most recent statements of rent owing must be provided with payment details included and must be less than 3 months old.

○ **IF ITEMS TO BE INSTALLED IN RENTAL PROPERTY**

- A **letter from the landlord** is required confirming:
  - Landlord's consent to installation and noting any restrictions.
  - the length of time the tenant has occupied the property.
  - the term of the lease and when it will expire
  - the landlord has no objections to the tenant continuing to occupy the property.

○ **SUPPORT LETTERS**
(for applications for specific needs arising from disability or disadvantage)

- Relevant supporting letters from professional sources applicable to the application, eg. Medical Practitioner, Dentist, Teacher, Occupational Therapist, Speech Pathologist, Support Agency.
- The supporting letters should:
  - be less than 3 months old
  - include information relevant to the Applicants' diagnosis (or lack of diagnosis), the Applicant's prognosis, symptoms and effects of their diagnosis on the quality of life of the Applicant and their family
  - include how the recommended item or service is beneficial to the Applicant, and
  - give an indication of the urgency of the financial assistance

○ **CURRENT FINANCIAL INFORMATION FOR APPLICANT**

- The *Statement of Household Income and Expenses* and the *Statement of Assets and Liabilities* which are a requirement of the online application **must be completed in as much detail and as accurately as possible** for the application to be considered by The Trust.
- **All Income and Debts of the Applicant and of any Relevant Person must be stated in detail, including total amounts in the Liabilities section.**

- A copy of the Applicant's payslip (if employed) and a recent statement of any Government assistance being received such as a Centrelink Statement must be provided.

PROCESSING THE APPLICATION

Lodge an Application

- Applications must be submitted **by 4pm** on the first day of the month to be considered at that month's meeting.
- Late applications received after the first 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.**

Assessment of Application

- The Trust's Board meets each month to consider applications.
- 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.
- The Applicants' Representatives will be notified by email regarding the outcome of the application.

If a grant is approved

- Funds will only be paid directly to suppliers on invoice or to the Representative's organisation.
- Payment will NEVER be made directly to an Applicant or their family, nor will cash payments be made.
- Once items purchased have been delivered, ownership is transferred directly from the supplier to the Applicant, or where applicable to the child/person or family intended to benefit from the Grant.
- The funds granted by The Trust cannot be used for any other purpose or item, without the prior consent of The Trust.
- Receipts from suppliers must be provided to The Trust no later than 14 days after the items are purchased or payment is made for services.

Expiry of Grant

- If the Grant has not been expended within 3 months of notification of the Grant, unless a time extension has been requested, the Grant of financial assistance will expire and there will be no continuing obligation of The Trust to make the payment of the Grant.
- If prior to the items or services being purchased, it is determined that the items or services proposed to be purchased or the financial assistance sought is no longer required, adequate or suitable, the application must be withdrawn and the Grant will be cancelled. An Applicant at the same time as withdrawing an application on these grounds may submit a new varied application for alternative similar or more suitable items, services or financial assistance for consideration by The Trust, however The Trust is under no obligation to approve a varied application.

HOW OFTEN CAN I APPLY FOR ASSISTANCE?

- An Applicant can only make one application for assistance in any 12-month period.
- Where an Applicant's application for assistance is successful and the grant is expended, that Applicant cannot apply for another grant during the period of 12 months from the date of the successful grant application being made.

- Where an Applicant's application for assistance is not successful that application cannot be made again at any time, but that Applicant may apply for something different after the expiry of 12 months from the date of refusal of the unsuccessful application.

ROLE OF THE REPRESENTATIVE

The Representative assisting the Applicant must:

- Complete the online application for the Applicant with as much of the information and details required as can reasonably be obtained from the Applicant.
- Provide an outline of the Applicant's background and reason for applying for assistance.
- Ensure that all supporting documents and information required for the application is submitted with the application.
- Ensure when any financial assistance is granted that it is promptly used for the purpose for which it has been given.
- Provide The Trust with receipts from suppliers no later than 14 days after the items 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 made through that Representative not being considered.

Applicants 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 USING THE ONLINE APPLICATION FORM WILL BE CONSIDERED.

EXAMPLE: "Statement of Household Income and Expenses (per Fortnight)"

WHEN APPLYING ONLINE A REPRESENTATIVE WILL NEED TO HAVE THE FOLLOWING INFORMATION AVAILABLE IN ORDER TO COMPLETE THE APPLICATION

INCOME – APPLICANT'S HOUSEHOLD PER FORTNIGHT			
INCOME - Applicant	**$**	**INCOME – other Relevant Persons**	**$**
Wage/Pension 1		Wage/Pension 1	
Wage/Pension 2		Wage/Pension 2	
Government / Family Payment		Government / Family Payment	
Board/Rent received		Board/Rent received	
Child Support		Child Support	
Other Income		Other Income	
Sub Total Applicant Income		**Sub Total Relevant Person Income**	

EXPENSES – APPLICANT'S HOUSEHOLD PER FORTNIGHT			
Housing		**Education**	
Rent		School/University/Course Fees	
Mortgage Payments		Uniforms/Books/Stationery (etc)	
Insurance		Child Care	
Utilities: Water		**Personal**	
Utilities: Gas		Clothing/Shoes	
Utilities: Electricity		Toiletries/Cosmetics	
Home Phone / Internet		Entertainment: Going Out	
Mobile Phone		Entertainment: Streaming / Pay TV	
Home Maintenance		Alcohol	
Transport / Vehicle		Cigarettes	
Car Loan Payments		Personal Spending (includes Lotto/Gambling)	
Car Expenses (Insurance/ License/Repairs)		Memberships/Other Fees	

Fuel		Union Fees	
Public Transport		**Loans**	
Taxi / Rideshare (eg: Uber)		Credit Card 1	
Groceries & Household Items		Credit Card 2 + more	
Food & General Household Items		Store Account 1	
Dining Out		Store Account 2	
Take-away Meals		Personal Loan 1	
Medical		Personal Loan 2	
Health Insurance/Ambulance		LayBy/Afterpay	
Doctor/Specialist/Dentist		Other Loan(s)	
Allied Health (Physio/Chiro etc)		**Other Payments**	
Chemist/Medications		Child Support	
Visual Aids (glasses/contacts)		Tax Debts	
		Fines and Court Ordered payments	
		Centrelink Repayment	
		Other Debts	
Sub Total Expense (column 1)		**Sub Total Expense (column 2)**	
		Sub Total Expense (column 1)	
		TOTAL HOUSEHOLD EXPENSES	
		Sub Total Income Applicant	
		Sub Total Income Related Person	
		TOTAL HOUSEHOLD INCOME	
		SURPLUS (OR SHORTFALL) (Total Income minus Total Expenses)	

EXAMPLE: "Statement of Assets and Liabilities"

WHEN APPLYING ONLINE A REPRESENTATIVE WILL NEED TO HAVE THE FOLLOWING INFORMATION AVAILABLE IN ORDER TO COMPLETE THE APPLICATION

ASSETS

"Assets" includes any item owned by the Applicant, owned by a Relevant Person or jointly owned by them

ITEM	BRIEF DESCRIPTION	$ ESTIMATE VALUE
House		
Household Effects		
Car(s)		
Motor Bike(s)		
Boat		
Other Property		
Shares		
Bank Accounts		
Cash		
TOTAL		

LIABILITIES

"Liabilities" means all debts owed by the Applicant, owed by a Relevant Person or jointly owed by them.
List **must Include** all debts whether the debts are identified in expenses as being paid off by instalments or not.

DEBT	BRIEF DESCRIPTION	$ TOTAL OWED
Home Loan Mortgage		
Rent Arrears		
Car Loan		
Credit Card 1		
Credit Card 2 + more		
Store Account 1		
Store Account 2		
Personal Loan 1		
Personal Loan 2		

LayBy/Afterpay		
Other Loan(s)		
Child Support		
Tax Debts		
Fines		
Court Ordered payments		
Centrelink Debt		
Other Debts		
TOTAL		