

General Distribution Registration Form

Form Preview

ORGANISATION INFORMATION

* indicates a required field

1. Organisation details

Organisation *

Organisation Name

ABN *

The ABN provided will be used to look up the following information. Click Lookup above to check that you have entered the ABN correctly.

Information from the Australian Business Register	
ABN	
Entity name	
ABN status	
Entity type	
Goods & Services Tax (GST)	
DGR Endorsed	
ATO Charity Type	More information
ACNC Registration	
Tax Concessions	
Main business location	

Please ensure your ABN and details listed above are correct as we will use this information to confirm your eligibility, including your charitable tax status and ACNC registration. Perpetual will not be responsible for any incorrect data.

Street Address *

Address

Address Line 1, Suburb/Town, State/Province, Postcode, and Country are required.

Phone (business hours) *

Must be an Australian phone number.

General email *

Must be an email address.

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Website *

Must be a URL.

1.1 Head of organisation details (CEO, Head of Department / School, Director of Institute etc)

Name *

Title	First Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

Position *

Email *

Gender: How do you identify? *

1.2 Applicant details

Applicant Name *

Title	First Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

Applicant Position *

Applicant Primary Address *

Address

Address Line 1, Suburb/Town, State/Province, Postcode, and Country are required.

Applicant Primary Phone Number *

Must be an Australian phone number.

Applicant Primary Email *

Must be an email address.

Applicant Primary Website *

Must be a URL.

I confirm the organisation is a going concern (can continue to operate on a financially viable basis into the foreseeable future). *

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☐ Yes ☐ No

I confirm the organisation is not under administration. *

Responding No will make the application ineligible.

ORGANISATION INFORMATION CONT'D

* indicates a required field

The organisation works within which sector? *

Funding Details

Trust(s) and/or Endowment(s) who may provide funding (where known):

This information is contained in the email sent from Perpetual.

Funding Amount (if known)

Must be a number.

BANK ACCOUNT DETAILS

If you have not yet received your payment, please provide bank details below.

If you have already received your distribution, you can leave this section blank.

Bank Account

Account Name

BSB Number

Account Number

Must be a valid Australian bank account format.

Please double check these details before submitting.

Accounts receivable contact

Title

First Name

Last Name

Email

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Phone (business hours)

USE OF INFORMATION AND CERTIFICATION

* indicates a required field

The information in this application form is collected by Perpetual Trustee Company Limited (PTCo), ABN 42 000 001 007, AFSL 236643 to assess your application for suitability to receive funding from trusts and endowments we manage or to assess whether your application may be suitable to disclose to an external organisation that approaches PTCo for potential projects or organisations to fund. If you do not provide information in the required fields your application may be deemed ineligible to receive funding from a trust or endowment we manage or contain insufficient information to be passed on to an external organisation. We may also use **aggregate and unidentifiable** application responses to determine sector trends, which we may share publicly.

The questions in the BANK ACCOUNT DETAILS section are designed to collect banking information for a Company. This information is collected to ensure payments are made to the correct bank accounts. We will be unable to make payment to your requested bank account unless you answer the questions correctly and completely.

We may disclose your personal information to outsourced providers supporting Perpetual's operations. You are entitled to access all personal information that the Perpetual Group holds about you.

We collect, use and disclose your personal information in accordance with our Privacy Policy, which includes details about how you may request access to and correct the information that we hold about you. Our policy also outlines our privacy complaints process. To review Perpetual's Privacy Policy please visit <https://www.perpetual.com.au/privacy-policy>. You can contact Perpetual's philanthropic services team via philanthropy@perpetual.com.au for more information.

Trustee companies such as Perpetual are regulated by the Commonwealth Corporations Act and supervised by the Australian Securities and Investments Commission. As a result, we are required to disclose certain information to our clients (such as beneficiaries of charitable trusts) about our services in a [Financial Services Guide \(FSG\)](#).

Organisation Name *

I/we agree to the delivery of disclosure documents, such as the FSG, electronically including via electronic mail or Perpetual's website please visit <https://www.perpetual.com.au/Privacy-Policy/Financial-Services-Guide>

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I/we consent to the information in this application being disclosed to an external organisation for the purposes of consideration for potential funding to the applicant

☐

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I/we give permission for Perpetual to provide all documents electronically including via email & understand that Perpetual will not accept any responsibility or liability for any unauthorised access or interference after transmission, or for any delay or non-delivery of any document

☐

I confirm and agree that the information provided within this form is accurate, true and correct, at the time of compilation and will be used for the purposes set out in the 'Use of Information and Certification' contained in this application form.

I give consent to be contacted from time to time by Perpetual to share sector insights (including findings and insights from this application process), articles, event invitations and surveys?

You can opt out from receiving any of the above communications at any time.