

Privacy Statement

Australian Executor Trustees, Equity Trustees Limited, Equity Trustees Superannuation Limited, and Equity Trustees Wealth Services Limited ('the EQT Group') are committed to protecting your privacy and supporting the Australian Privacy Principles under the Privacy Act 1988 (Cth).

Our Privacy Statement is available [here](#) and is intended to inform you about the following:

- the type of personal information that we collect;
- the manner in which we collect your personal information;
- the main purposes for which we use that information;
- how you can access, correct or update any personal information that we hold about you; and
- how we keep the information secure.

Before submitting your acquittal, please ensure you have read [Equity Trustees' Privacy Statement](#).

Please note, Australian Executor Trustees and Equity Trustees may make public your project description, the name of your organisation and the grant amount awarded to you.

Instructions

Using this Form

1. Completing your Form

You may fill in the form in any order you choose. Move between the pages of the form using the Form Navigation menu at the right of screen. Or, click the Next Page and Previous Page buttons at the top or bottom of the page.

2. Completing your Form in a group/team

You can share your login details to allow colleagues to work on a form with you. However, avoid editing the form at the same time as somebody else.

3. Saving your draft Form and returning later

Your form is automatically saved each time you move between pages. You can also click the Save button at the top of the page, which you should do when logging out or leaving the computer for an extended period. Your saved form will be available for you to continue next time you log in.

4. Submitting your Form

To submit your form, you must click the Submit button on the final Review page of the form.

Your form will not submit if: - You have failed to answer any compulsory questions. - You have exceeded any word limits. - You have entered any other invalid data (such as an invalid ABN).

5. Form submission confirmation

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Form Preview

After submitting you will receive a confirmation email including a PDF copy of your form. If you do not receive this email, contact Equity Trustees to confirm we have received your form.

Further Support

Technical Support or Questions about Eligibility and Guidelines

Please email Australian Executor Trustees at philanthropy@aetlimited.com.au, quoting your submission number if applicable.

Applicant Overview

* indicates a required field

Contact Details

Applicant

First Name

Last Name

Position / Title *

Phone *

Email Address *

Address *

Address

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

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

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Form Preview

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

Must be an ABN.

Application

* indicates a required field

Project Proposal

Please identify the problem to be addressed or the opportunity which has presented itself? *

Word count:

Must be no more than 100 words.

Project methodology or process *

Word count:

Must be no more than 250 words.

Project milestones *

Word count:

Must be no more than 250 words.

Objectives

Statement of Purpose: please link the project to the purposes for which the Sir Ross and Sir Keith Smith Fund was established and attempt to document the required end result of the project. *

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Form Preview

Word count:

Must be no more than 400 words.

Desired Outcomes/Objectives: This concise and quantitative statement should demonstrate how the project will achieve the objectives and should be supported by a list of desired outcome(s)/project objectives. Objectives should be stated in such a way that they are measurable, wherever possible. You should also include any critical success factors and market potential. *

Word count:

Must be no more than 400 words.

Scope

Please define the scope of the project. *

Word count:

Must be no more than 200 words.

Please clarify what is excluded from the scope of the project. *

Project Team

List all members of the project team, their qualifications/experience and their responsibilities when acting within the project.

Name	Role/Position	Key responsibility	CV

Stakeholders

List the organizations that have expressed an interest in the project's outcomes and include letters of support.

Organisation	Interest	Letter of Support

Risk

Identify any key risk factors for the project, and suggest mitigation strategies for each risk. *

Word count:
Must be no more than 250 words.

Budget

Include a detailed budget of human and financial resources required to complete the project. You should also include details of any other sources of funding.

Income	\$	Expenditure	\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$

Do you anticipate follow-on activities from this project? If yes, will you be seeking future funding from the fund to support these activities. Please describe the activities anticipated. *

Deliverables & Communication

Project deliverables necessary to achieve the project objectives *

Include a proposal to define the mechanisms and frequency that progress on the course/research/sponsorship program will be reported to the Trustee. (The minimum requirement is an annual report by 1 November each year) *

Word count:
Must be no more than 400 words.

Supporting Document

* indicates a required field

Letter of Support

Please upload a letter of support from stakeholders should indicate exactly how each stakeholder will contribute (with specific details) towards the project. *

Attach a file:

Testimonial Letter (Optional)

Please upload a testimonial letter, e.g. A letter from your future customers expressing their view of the project and how this project may benefit their business upon completion.

Attach a file:

One more step...

YOU MUST FOLLOW THESE STEPS TO SUBMIT YOUR FORM

1. Click the "Review" button at the top right of this form.
2. If necessary, review your answers.

Important: Form submission is **final**. You cannot make changes to your form after it has been submitted.

3. When ready to submit, click the "Submit" button at the top right of the form.
4. Shortly after submitting you will receive a confirmation email including a PDF copy of your form.

Important: If you do not receive this confirmation email, your form may have failed to submit. Please check your spam mail folder, or contact Australian Executor Trustees at philanthropy@aetlimited.com.au to confirm we have received your form.

Are you having trouble submitting?

If you have any questions regarding the submission of your form, please refer to the help contact details on Page 1 of the form.

Certification

* indicates a required field

Certification

By lodging this Form:

- I certify that to the best of my knowledge the statements made in this Form and supporting documents are true;

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Form Preview

- I consent to the information contained within this Form being disclosed to or by Australian Executor Trustees and / or Equity Trustees for the purpose of assessing, administering and monitoring this and any future Grant Applications;

Please enter your name below to signify agreement to this Certification.

Full Name *

Position *