CHARITY/NOT-FOR-PROFIT QUESTIONNAIRE

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| --- | --- |
| Proposed Name of Organisation |  |
| Registered Address |  |
| Who will the initial members be? There needs to be at least one member. Members can be natural persons or corporate entities.  |  |
| **Purposes/activities:*** Who will you assist?
* What type of assistance will you provide?
* How will you provide this assistance?
* Will you work with any other partners/organisations?
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| **Governing rules:**Are there any specific structures or procedures (for example in relation to membership, voting rights or casting votes) that you would like us to include in the organisation’s governing rules? |  |

In relation to each director/board member, please provide us with the information below. Please note that a minimum of three directors/board members is required.

|  |  |
| --- | --- |
| Full name |  |
| Address |  |
| Email address |  |
| Phone number |  |
| Date of birth |  |
| City and Country of birth (i.e. Melbourne, Australia) |  |
| Tax file number |  |
| Occupation |  |
| Position to be held in organisation (i.e. director, treasurer, secretary, president etc.) |  |

Please note that you need a minimum of three directors and a majority of directors must reside in Australia and not be family members. Further, in the case of a PBI, HPC, or public fund majority of the directors should be ‘responsible persons’ as defined by the tax regulations.

By way of summary, the following people are considered to be ‘responsible persons’:

* Individuals who perform a public function, such as school principals, judges, religious practitioners, solicitors, doctors, mayors, councillors, town clerks, directors of large companies, and members of parliament.
* Individuals who have received formal recognition from the Government for their services to the community (for example, an Order of Australia OA award).
* Individuals who are licensed or registered to practice in a range of professional occupations such as dentists, legal or medical practitioners, nurses, pharmacists, bailiffs, bank officers or officers of a building society or credit union with 5 or more continuous years of service, clerks of the court, justices of the peace, judges, magistrates, marriage celebrants, other professional persons, mayors, town clerks, members of Parliament, government employees with 5 or more years of continuous service, and teachers employed on a full-time basis at a school or tertiary education institution.
* Individuals who belong to a professional body which has a professional code of ethics and rules of conduct. Such bodies include the Institute of Chartered Accountants, State Law Societies, Medical Registration Boards, Engineers Australia, and Chartered Secretaries Australia.