

# ***JOE & EVE MAJOR TRUST***

## **APPLICATION FOR FUNDS – NOVEMBER 2011**

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### **WHO MAY APPLY?**

You may apply for funding for this allocation if:

- 1 - You are commencing your tertiary study at the beginning of the new year (i.e. February/March 2012) and your course runs for the full year; or
- 2 - Your course of study is for less than a year and will commence between the application closing date (Friday 18 November 2011) and June 2012.

Application forms should be sent to:

The Trust Secretary  
Joe & Eve Major Trust  
PO Box 5048  
Wellington 6145

**Applications must be received by 4.00pm on Friday 18 November 2011**

### **LATE OR INCOMPLETE APPLICATIONS WILL NOT BE ACCEPTED**

*It is suggested that applicants post their completed forms at least one week ahead to ensure that they are received in time. If your application has not been acknowledged within 10 working days of postage to the Trust, please telephone the Trust Secretary, Jan Page on (04) 473-6612.*

### **A REMINDER**

The Trust was established in 1996, made possible by the very generous bequest of the late Temple members, Joe and Eve Major. The purpose of the Trust is to assist Temple members to undertake tertiary education of their choice, either in New Zealand or overseas.

The Trust is administered by a Board of Trustees, which is elected annually at an AGM to which all Temple Members are invited and may vote. The current board comprises Carol Green, Phillip Green (Chair), Polly Schaverien, Kelvin Ratnam and David Young (Treasurer). Applications for grants are called twice yearly (mid-year and end of year), and the Board meets shortly after each closing date to consider the applications received. To be successful, very simple requirements need to be met. These are:

- The applicant must be a current financial Temple Member
- The applicant must be embarking on or continuing a course of tertiary education
- The application form must be completed correctly
- The application form must be received by the closing date

The Trust has invested its funds conservatively so as to ensure that the capital remains secure. It is the INTEREST earned on its investments each year which is available for the issuing of grants (after having first set aside sufficient to CPI adjust the fund annually, so that it retains its "real" value).

# APPLICATION FOR FUNDS – NOVEMBER 2011

FULL NAME OF APPLICANT: .....

DATE OF BIRTH: .....

RESIDENTIAL ADDRESS: .....

POSTCODE: .....

MAILING ADDRESS (IF DIFFERENT FROM ABOVE): .....

POSTCODE: .....

TELEPHONE: DAY: .....

EVENING: .....

EMAIL ADDRESS: .....

MARITAL STATUS: .....

AGES OF DEPENDENTS: .....

I AM CURRENTLY A FINANCIAL MEMBER OF TEMPLE SINAI  
(THE WELLINGTON PROGRESSIVE JEWISH CONGREGATION): YES / NO

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Note: Temple membership is determined by the provisions of the Temple Sinai constitution. The relevant provisions defining Temple membership state:

7. **MEMBERSHIP**

- 7.7 Members shall pay an annual subscription which shall be determined from time to time by the Board. Should a Member's subscription be 12 months or more in arrears, then that Member shall not be entitled to vote or to be elected to any office until such time as the due subscription is paid.
- 7.8 The Board, or any duly authorised officer of the Board, may at its discretion waive all or any part of a Member's subscription.

8. **CESSATION OF MEMBERSHIP**

- 8.1 Any Member of the Congregation shall cease to be a Member...
- (c) if the Member's subscription is 15 months or more in arrears and no satisfactory arrangement has been entered into with the Treasurer [added 24 May 1998].

You should be aware that the Trust will be making enquiry of the Temple's Secretary, Kathy Kerry, to confirm that you are a member of Temple Sinai before a grant can be made.

You are therefore urged to confirm your membership status with Kathy Kerry, Secretary, Temple Sinai, who may be contacted on ph (04) 385 0720.

**PERSONAL PROFILE:**

Please use a separate sheet to write an introduction about yourself and to describe your academic and career plans for the Trustees. Do not send a curriculum vitae.

*If you applied in a previous year, you need only update your previous profile.*

**EDUCATIONAL QUALIFICATIONS:**

Please list institutions attended, years attended and qualifications gained. Please note that you must enclose photocopies of certificates of achievement.

*If you applied in a previous year, you need to report on your progress since then and must include copies of official transcripts or mark records where available.*

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**PROPOSED COURSE OF STUDY FOR 2012:**

**Institution:** .....

**Course:** .....

**Subjects:** .....

.....  
.....

<b>Date course commences:</b> .....	<b>Fees payable for course:</b> .....
<b>Length of course:</b> .....	<b>Date for payment of fees:</b> .....

**BEYOND 2012, WHAT ARE YOUR PLANS FOR YOUR TERTIARY EDUCATION?**

.....  
.....  
.....  
.....

**YOUR BUDGET FOR 2012:**

Course fees:	\$
Books:	\$
Travel (specifically related to study):	\$
Living expenses (including accommodation):	\$
Other:	\$

*\* Please indicate where the figure is an estimate*

**What other funds have you applied for? (source and amount):**

.....

**What other funds have you received? (source and amount):**

.....

**What other funds do you anticipate you might receive (e.g. scholarships)? (source and amount):**

.....

.....

**REFERENCES:**

Please enclose two written references (photocopies acceptable). References must be **signed and dated**, and referees **must not** be members of your family. **Unsigned references are not acceptable.**

References sent by email may be provided, subject to the following:

- the reference must be **signed and attached as a pdf file**;
- the reference must be dated (not necessarily the same date as the email); **and**
- the referee must provide separate additional contact details, which must include telephone and address.

Please note it is your responsibility to ensure that these requirements are complied with.

Please list names, addresses and telephone numbers of two referees:

1. ....

.....

2. ....

.....

*If you applied in a previous year you may resubmit the previous references.*

**GUARANTOR:**

Your guarantor is the person who agrees that in principle he/she will be willing to enter into a formal deed of guarantee for your 2012 grant. That person must sign here to that effect. Please provide the full name and contact details of your guarantor.

Name of Guarantor: .....

Address: .....

Phone: ..... (Please indicate whether day/evening)

Email address: .....

Signature of Guarantor: .....

Date: .....

**PRIVACY ACT 1993**

Pursuant to the Privacy Act 1993 the following is brought to your attention:

This application collects personal information about you.

The information is collected to evaluate the strength of your application for funding.

The intended recipients of the information are the Joe and Eve Major Trust Trustees and the additional members of the Grants Committee appointed to sit and consider your application.

The information being collected will be held by the Trustees at the office of P D Green, Barrister, 192 Sydney Street West, Thorndon, Wellington.

The collection of this information is required pursuant to the Trustees' duty to fully and carefully consider each application which comes before the Trust, so that the Trustees may determine the success or otherwise of the application and the level of funding which may be given.

**The failure to provide full details of all information sought may result in your application for funding being declined.**

You have right of access to, and correction of, this information subject to the provisions of the Privacy Act 1993.

**AUTHORITY**

To: The Trustees for the Joe and Eve Major Trust

I authorise you to make enquiries such as are necessary for the purpose of verifying any information given by me in support of my application, including discussing the content of the application with my referees.

I further authorise you to disclose the content of this application to my guarantor and/or referees.

Signed: ..... (Applicant to sign here)

Date: .....

**DECLARATION:**

I certify that the above information is true and accurate and that the grant/loan, if given, will be used for the stated purpose.

Signed: ..... (Applicant to sign here)

Date: .....

Witness name: ..... (Print)

Witness signature: .....

Date: .....

**NOTE: Policy in relation to Applicants who have successfully applied for funding in the previous year, but who have not passed all of their subjects [added June 2005]:**

1. Where the applicant has passed half of more of all subjects during the year - they qualify for funding in the subsequent year.
2. Where the applicant has passed less than half of all subjects during the year - they are only eligible to receive 50% of the allocated funding set for fully successful candidates.
3. Where an applicant has two successive years of failing to achieve half or more of all subjects sat, then the applicant is required to sit and pass half of subjects sat in one year before being eligible for further funding. In special circumstances the Board may waive this policy.

*You will be advised in writing whether or not your application has been successful. If your application is declined, reasons for declination will be given.*

*No correspondence will be entered into.*

When completed please post this form to:

The Secretary  
Joe and Eve Major Trust  
PO Box 5048  
Wellington 6145

*Late or incomplete applications will not be accepted.*

## Checklist - you are strongly advised to use this list:

- |                          |  |                         |
|--------------------------|--|-------------------------|
| <input type="checkbox"/> | make the application?  | Are you eligible to     |
| <input type="checkbox"/> | with Kathy Kerry, Secretary, Temple Sinai, that you are currently a financial member of Temple Sinai (ph (04) 385 0720)? | Have you checked        |
| <input type="checkbox"/> | with the Trust Secretary, PO Box 5048, Wellington 6145, by the due date?   | Is the form going to be |
| <input type="checkbox"/> | been <b>fully answered</b> ?   | Has every question      |
| <input type="checkbox"/> | personal profile or an update of your previous profile?  | Have you included a     |
| <input type="checkbox"/> | copies of qualification and achievement certificates?  | Have you included       |
| <input type="checkbox"/> | have you included a transcript or record of your marks?  | Where appropriate,      |
| <input type="checkbox"/> | and funding details completed? (Make sure all amounts are shown)   | Are your study, budget  |
| <input type="checkbox"/> | your two references from non-family members?   | Have you enclosed       |
| <input type="checkbox"/> | <b>signed and dated</b> by the referees?   | Are both references     |
| <input type="checkbox"/> | email reference is it showing a hand-written signature?  | If you are using an     |
| <input type="checkbox"/> | details been completed?  | Have the guarantor      |
| <input type="checkbox"/> | signed the form?   | Has the guarantor       |
| <input type="checkbox"/> | Privacy Act authority?   | Have you signed the     |
| <input type="checkbox"/> | dated the Declaration and had it witnessed?  | Have you signed and     |