

JOE & EVE MAJOR TRUST

APPLICATION FOR FUNDS - JUNE 2023

WHO MAY APPLY?

You may apply for funding for this allocation if:

1. you are commencing your tertiary study after June 2023 and you have not received funding from the November 2022 allocation, or
2. your course of study is for less than a year and will commence between the application closing date (Friday 24 June 2023) and December 2023.

Application forms should be posted or emailed to:

The Trust Secretary
Joe & Eve Major Trust
105 Waterloo Road
Lower Hutt 5010
janpage102@hotmail.com

Applications must be received by 4.00pm on Friday 24 June 2023.

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) 5664656 or 0274530489.

A REMINDER

The Trust was established in 1996, made possible by the very generous bequest of former 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 (Treasurer), Phillip Green (Chair) and Michael Blaschke. 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 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 - JUNE 2023

FULL NAME OF APPLICANT:

DATE OF BIRTH:

RESIDENTIAL ADDRESS:

POSTCODE:

MAILING ADDRESS (IF DIFFERENT FROM ABOVE):

BANK ACCOUNT

POSTCODE:

TELEPHONE:

DAY:

EVENING:

EMAIL ADDRESS:

MARITAL STATUS:

AGES OF DEPENDENTS:

I AM CURRENTLY A MEMBER OF TEMPLE SINAI
(THE WELLINGTON PROGRESSIVE JEWISH CONGREGATION):

YES / NO

Note: Temple membership is determined by the provisions of the Temple Sinai Rules.

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 with Kathy Kerry, Secretary, Temple Sinai, who may be contacted on phone (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.

PROPOSED COURSE OF STUDY FOR 2023-2024:

Institution:

Course:

Subjects:

Date course commences:

Length of course:

Fees payable for course:

Date for payment of fees:

BEYOND 2023-2024, WHAT ARE YOUR PLANS FOR YOUR TERTIARY EDUCATION?

YOUR BUDGET FOR 2023-2024:

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 (eg 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 - these references **must** be included with this application.*

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 Trust Secretary.

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 referees.

COMMITMENT TO REPAY

The Applicant acknowledges that in receiving funds from the Trust the Applicant is obligated to use those funds for the sole purpose of completing the course(s) of study supporting this application and any failure on the part of the Applicant to honour the Applicant's obligations contained in this Agreement including specifically failing to complete the Course (except for Trust approved extenuating circumstances) shall amount to a breach of this Agreement. The Applicant will upon demand by the Trust pay to the Trust the following:

- (a) if the breach shall occur within the first three (3) months of receiving Scholarship monies: 75% of the Scholarship;
- (b) if the breach shall occur within the second three months of receiving Scholarship monies: 50% of the Scholarship;
- (c) if the breach shall occur within the third three months of receiving Scholarship monies: 25% of the Scholarship;
- (d) if the breach shall occur within the fourth three months or thereafter of receiving Scholarship monies: 10% of the Scholarship.

ADVICE OF STUDY OUTCOMES

The Applicant undertakes to advise the Trust of the results of any examinations or other forms of study assessment at the end of the course(s) of study and within 21 days of being advised of the results. Advice to the Trust may be emailed to the Trust Secretary or sent by post.

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 sign, where and as required, and post or email this form to:

The Secretary
Joe and Eve Major Trust
105 Waterloo Road
Lower Hutt 5010
janpage102@hotmail.com

Late or incomplete applications will not be accepted.

Checklist - you are strongly advised to use this list:

- Are you eligible to make the application?
- Have you checked with the Secretary, Kathy Kerry, that you are currently a member of Temple Sinai (ph (04) 385 0720)?
- Is the form going to be with the Trust Secretary, by post to 105 Waterloo Road, Lower Hutt 5010, or emailed by the due date?
- Has every question been **fully answered**?
- Have you included a personal profile or an update of your previous profile?
- Have you included copies of qualification and achievement certificates?
- Where appropriate, have you included a transcript or record of your marks?
- Are your study, budget and funding details completed? (**Make sure all amounts are shown**)
- Have you enclosed your two references from non-family members?
- Are both references **signed and dated** by the referees?
- If you are using an email reference is it showing a hand-written signature?
- Have you signed the Privacy Act authority?
- Have you signed and dated the Declaration and had it witnessed?