Instructions and Guidelines 2027

Our IMPACT Philanthropy Application program creates meaningful connections between philanthropists and Not-for-Profit (NFP) organisations. It provides a platform for NFP's to showcase how they deliver improved outcomes for the communities they serve. We support high-quality, sustainable impact by identifying organisations that demonstrate strong governance, capable leadership, strategic clarity, and a clear focus on measurable outcomes.

Charitable status

Your organisation must have at least one of the following to be eligible for funding from the trusts and endowments that are managed by Perpetual Wealth:

- Be a registered charity on the ACNC register and/or
- Australian Taxation Office Deductible Gift Recipient (DGR1) endorsement (covered by Item 1 of the table in section 30-15 of the Income Tax Assessment Act 1997).

Your application will be marked **ineligible** if your organisation is one of the following:

- **Under administration.**
- **Not a going concern.**
- **Has a compliance action against it by the ACNC.**

It will also be marked **ineligible** if:

- The bank account details provided are for an individual or do not match the organisation name.
- Your medical research project has not received ethics committee approval. **Confirmation of approval must be provided by 1 March 2027.**

Key information

Applications open
Wednesday 4 November 2026,
9.00 AEDT

Applications close
Friday 4 December 2026,
5.00pm AEDT.

Further information
Perpetual Wealth Philanthropic Services
Phone: 1800 501 227
Email: philanthropy@perpetualwealth.com.au
perpetualweath.com.au/impactphilanthropy

Conditions

Only applications made using the online form will be accepted. You can access the application form here perpetual.com.au/impactfunding.

Organisations may submit a **maximum of two applications.** They may be for programs anywhere in Australia, or overseas.

Universities, hospitals, and medical research institutions may submit a maximum of three applications. This includes organisations whose primary purpose is medical research.

There is no requirement for applications to be from different departments.

If your organisation is a university, hospital, or medical research institute, please coordinate the lodgement of your application with your head office or central research office. For medical research applications, only applications approved by your organisation's central research or fundraising office will be eligible.

Any additional applications received from your organisation that are above the maximum limit will be marked as ineligible for funding. The last application submitted will be deemed ineligible

Please ensure the organisation name entered in the application is your organisation's ABN registered name, as per the Australian Business Register website - www.abr.business.gov.au. Please note that payment will be made to the entity's ABN registered name.

It is in your organisation's best interest to ensure you supply us with the correct details.

If at any time during the application and assessment period your organisation secures funds from another source, which changes the funding situation from that recorded on the application, please email philanthropy@perpetualwealth.com.au with details of the change. Circumstances will be considered on a case-by-case basis.

Types of funding

Funding is provided for a wide range of projects at different developmental stages including (but not limited to) pilot and existing projects, capacity building and operational costs.

The following will **not** be considered for funding and applications will be marked ineligible:

- Retrospective funding - meaning support for activities that have already taken place.
- Fundraising appeals (including general capital appeals).
- Funding direct to individuals.

Reporting

If you are successful in receiving funding Acquittal reports will be due by 31 January annually until grant obligations have been completed and funds are fully spent.

Please note that failure to submit acquittal reports on activities funded in the past may result in your organisation being declared ineligible for funding in future programs.

Please contact philanthropy@perpetualwealth.com.au with any acquittal enquiries.

Period of funding

Funding is generally provided as a single year one-off grant.

Changes or extensions

It is the responsibility of the successful grant recipient to advise Perpetual Wealth of any changes in circumstances, budget, or delays in your project.

If you are successful in receiving funding, a Change Request form will be available in your Grant Toolbox portal.

Size of grants

As a guide, grants generally range between $10,000 and $100,000.

Over recent years, the average grant has been $80,000.

The maximum amount an organisation can request is $120,000 per application. Any requests over this amount will be marked ineligible.

Assessment criteria

Assessment criteria will be based on both the governance of the organisation and the activity. The applicant should seek advice from the most appropriate person/s in the organisation when completing the application form. Assessment is based on questions specific to the criteria below:

1. **Strategy**: Evidence of strategic goals and demonstrable outcome-orientated measures. This includes how an organisation tracks its effectiveness against its mission and risks related to its ongoing operation.
2. **Outcomes**: You must be able to demonstrate activity outcomes with evidence that is measurable, realistic and will provide a clear picture of the long-term impact of funding.

3. **Capability**: Evidenced by the organisation's demonstrated ability to achieve its objectives with the resources available to it. To that end, we look closely at each applicant's measures of organisational efficiency in business practice.
4. **Leadership:** Awareness of the external environment including public policy, government, other organisations working within the sector, and the community.

Focus areas

You do not need to direct your organisation's application to a specific trust, unless specifically invited to do so. As part of our assessment process, we will match your organisation to all appropriate trusts and endowments.

As a trustee it is our duty to ensure the funds from the charitable trusts and endowments we manage are distributed according to the terms of the founding document, eg a will or trust deed. In most cases, restrictions are placed on the trustee to provide funds:

- to a specific type of organisation;
- for a specific cause or purpose;
- to a specific geographical area.

Assessment of your organisation's application

The application will be reviewed by Perpetual Wealth's Philanthropy Services team. Please do not attach any additional information as part of the application for funds unless you receive a specific request to do so.

If necessary, the application may also be assessed by an appropriately qualified person or panel to make a recommendation to the trustees.

The application is then considered by the relevant committee or board of trustees.

Notification

If your application does not meet the minimum requirements to be recommended for funding, you will be notified of this outcome in March 2027.

All other applicants will receive notification of their outcome, both successful and unsuccessful, during the final week of June 2027. Please do not contact Perpetual Wealth before this time regarding the progress of the application unless your circumstances have changed.

We receive more funding requests from eligible organisations than there are funds available.

Often trustees must decline applications even if they meet the stated criteria.

We cannot provide individual feedback on applications at any point.

Successful applications

1. Distributions will be paid to your organisation in the last week of June 2027. These payments will be made via EFT into the nominated bank account provided in the application form. The application ID number will appear on the recipient's bank account. In some cases, the payment might be split into a number of payment amounts reflecting funding from multiple trusts.
2. Grant recipients will receive formal notification via Grant Toolbox before payment is made detailing the trust(s) and/or endowment(s) that have provided funding for the activity. The email will be sent to your organisation's CEO & applicant as detailed on your organisations profile in Grant Toolbox. In some cases, a Perpetual Wealth representative may personally deliver a funding letter.
3. If the applicant or CEO changes after you have applied, please update your organisation profile in Grant Toolbox with the new contact details.

   While not a requirement, if you wish to acknowledge the trust(s) and/or endowment(s) providing the grant in any publications or reports, please contact Perpetual Wealth Philanthropic Services at philanthropy@perpetualwealth.com.au for approval.

Terms of funding

1. The decision of the trustees is final and is not subject to any appeal process.
2. Grants to organisations must be used for the purpose stated in the application.
3. Funded organisations are required to provide acquittal reports by 31 January annually, until the project is complete, or all funds have been spent. If you are successful in securing funding,

blank acquittal reports will be available in your Grant Toolbox profile.

4. Multi-year funding is at Trustee discretion only and in most cases, is dependent on regular acquittals being submitted.
5. Perpetual Wealth considers the funding provided to organisations as grants that are freely given and would not ordinarily constitute consideration for taxable supply by the recipient.
6. As a general rule, Perpetual Wealth does not intend to include the GST incurred by an organisation for the purchase of equipment or provision of services to the community in any grants. It is presumed your organisation is registered for the GST and therefore you are able to reclaim this amount.
7. By submitting the application form, you consent to Perpetual Wealth sharing the details of your application with potential funders and if funded, the details of your application may be made public. Further details regarding Perpetual Wealth's privacy policy are available on the website - https://www.perpetual.com.au/privacy-policy/

Instructions for completing your application

1. Read the instructions and guidelines carefully to ensure that you understand the assessment criteria, and if your organisation is eligible for funding.
2. To access the **2027 Application Form,** go to Perpetual Wealth's website at https://www.perpetual.com.au/wealth-management/not-for-profits/impact-funding/ and click on **Applications now open – apply here**.
3. To apply, you will need an active Grant Toolbox profile/login.
   - If you don't have a login, you will need to **Register**.
   - If you already have a login, then enter your login details in the **Login** section.
4. Complete the application form by typing your responses directly into the spaces provided in the form.
5. Please keep your answers as concise as possible as there is limited space in the form to answer each question (word limits have been provided).
6. Please complete each answer in full. Do not use 'as above' or 'refer to x section'.
7. Ensure the application is accurate and complete before you submit it. Once the application is submitted it is deemed final and cannot be amended. You will receive an automated email indicating that the application has been submitted.

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More information
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perpetual.com.au/impactphilanthropy