

Client: _____ Date: _____

Address: _____

Email: _____ Phone: _____

APPLICANT DETAILS

Full Name	Date of Birth	Relationship to client	Address if different to client

OTHER MEMBERS OF HOUSEHOLD

Full Name	Date of Birth	Relationship to Client

HAVE YOU APPLIED OR RECEIVED ASSISTANCE WITH US OR OTHER ORGANISATIONS BEFORE?

☐ YES/ ☐ NO

IF YES, PLEASE PROVIDE FURTHER DETAILS:

Date	Organisation	Amount of Assistance	Type of Assistance

REQUEST FOR ASSISTANCE:

Please describe your request for assistance and the amount being sought:

SUPPORTING DOCUMENTATION

(Please attach copies of any documentation which will assist us in verifying and supporting your application)

Documentation	Attached	
Bank Statements showing transactions over the past two (2) months for all bank accounts and credit cards including partner/spouse	Yes	No
Income statement from Centrelink or DVA	Yes	No
Documentation confirming income from all contributing household members	Yes	No

If you have not attached any of the above documentation, please advise why:

INCOME FORTNIGHTLY

(Please also detail any person that contributes to the household financially)

Income Type	Applicant	Spouse/partner	Other	Other	Other	TOTAL
Wages or income from self-employment						
DVA Service Pension						
DVA War Widows Pension						
DVA Income Support Supplement						
DVA - MRCA SRCA / VEA						
Child Support						
Rental Assistance						
Investment Income						
Aged Pension						
Disability Pension						
Parenting Payment						

Carers Payment						
Carers Allowance						
Youth Allowance						
Family Tax Benefit A						
Family Tax Benefit B						
Superannuation						
Other						

EXPENDITURE FORTNIGHTLY

Basic needs	Housing (mortgage, rent)	\$
	Rates	\$
	Insurances (home, contents, vehicle)	\$
	Food and groceries	\$
	Electricity	\$
	Gas	\$
	Telephone (landline, mobile)	\$
	Vehicle Expenses (registration, repairs, fuel, insurance)	\$
		\$
	Clothing / personal care	\$
	Repayments to Centrelink / DVA	\$
	Other (please specify): _____	\$
Creditors (loans, credit cards, family, friends)	Loan 1: _____	\$
	Loan 2: _____	\$
	Fines:	\$
	Other:	\$
	Transport costs (fuel, bus, train, taxis)	\$

Access, social inclusion and incidentals	Recreation / Entertainment	\$
	Incidentals	\$
	Other	\$
Health and Home Care Needs	Life Insurance	\$
	Funeral plan	\$
	Doctor's visits	\$
	Medical treatment / aids	\$
	PBS medicines	\$
	In-home services	\$
Personal and discretionary items <i>(this information will complete the financial assessment/ household budget, but is not a mandatory requirement for the provision of financial support)</i>	Cigarettes/liquor	\$
	Pay TV	\$
	Pets	\$
	Subscriptions	\$
	Savings	\$
Children / Dependants expenses	School / University Fees	\$
	Child Care / Carer Fees	\$
	Uniforms	\$
	Stationery/Technology	\$
	Tutoring	\$
	Excursions / School Incidentals	\$
	Doctors / Specialists Fees	\$
	Medical Equipment / Aids	\$
	PBS Medicines	\$
	Transport	\$
	Sport / Recreation	\$
Other		\$
Total Expenses =		\$
Total Income – Total Expenses =		\$

ASSETS OVER \$5,000 (e.g. Boat, Motor Vehicle, Motor Home, Jet Ski, Motor Bike)

Asset	Approximate value

REVIEW DATE: _____

FINANCIAL STATEMENT AGREEMENT

I understand and acknowledge that the information I have provided above regarding my finances is only for the purposes of Legacy Brisbane to assess my financial circumstances and support me in the most appropriate way.

I declare that all the information is complete and accurate to the best of my knowledge.

Signed (applicant): _____ Date: _____

Signed (CSO/Legatee): _____ Date: _____

FINANCIAL ASSISTANCE PROPOSAL

Proposal: _____

Proposed by: _____ Date: _____

Approved by: _____ Date: _____

Review due: _____ Date: _____

Reviewed by: _____ Date: _____

APPENDIX 2 Approved Delegations (extract of Board Handbook)

4.11 Delegations

4.11.1 The Chief Executive Officer is charged with the duty to provide leadership and manage Legacy Brisbane in accordance with the strategic policies and programs approved by the Board.

Managers and Group Chairs act on behalf of Legacy Brisbane with service providers and Legacy dependants.

To facilitate the operations of Legacy Brisbane, the Board has delegated its authority in accordance with the following table and sub-clauses 4.12-4.15:

Activity Area	Description	Type of limit	CEO	Delegated position	Sub-delegates	Unbudgeted
Corporate and executive services	Individual invoices	Dollar value	< \$50,000	Finance Manager; P&CM <\$2,500	EA < \$200	
Corporate and executive services	Total project value	Dollar value	< \$50,000	Finance Manager; P&CM <\$2,500	None	
Corporate and executive services	Capital purchases not funded by a grant	Dollar value	< \$50,000	Finance Manager <\$2,500	None	CEO < + \$10,000
Corporate and executive services	Disposal of bequest assets (incl. real property)	Dollar value	\$10,000 or 3%, below valuation	Finance Manager as per CEO	None	N/A
All departments	Execution of service agreements and operating leases	Term & Dollar value	5 years; < 5% increase item's current annual budget	Managers <1 year; <\$2,500; Head FRMC only: use of Legacy logo	None	CEO < \$10,000 total contract value
All departments	Execution of local business or local government agreements/ grant applications or with Legacy public liability COC	Term & Dollar value	5 years; <\$50,000	Managers & Group Chairs <1 year and/or <\$2,500; No use of Legacy logo (Head FRMC only)	None	N/A
Fundraising, Marketing and Comms	Operational and per budgeted item/ event	Dollar value	< \$50,000; Gala Dinner <\$150,000	Head FRMC <\$10,000 Group Chair \$500	Event Co-ord <\$500; FR Staff <\$200	CEO < + \$10,000
Fundraising, Marketing and Comms	Accumulated expenses for a specific budgeted fundraising event or project	Dollar value	< \$75,000; Badge Week < \$120,000; Gala Dinner <\$270,000	Head FRMC <\$20,000 Badge Week <\$30,000 Gala Dinner <\$40,000 Group Chair \$1,000	Event Co-ordinator < \$2,000; FR Staff <\$200	CEO < + \$10,000

Activity Area	Description	Type of limit	CEO	Delegated position	Sub- delegates	Unbudgeted
Fundraising, Marketing and Comms	Capital purchases not funded by a grant	Dollar value	< \$50,000	Head FRMC < \$15,000	None	CEO < + \$10,000
Community Services	Operational and program expenses per budgeted item/ event	Dollar value	< \$50,000	CSM < \$5,000	Event Co-ordinator < \$500; CS Staff < \$200	CEO < + \$10,000
Community Services	Accumulated expenses for a specific budgeted event	Dollar value	< \$50,000	CSM < \$20,000	Event Co-ordinator < \$2,000; CS Staff < \$200	CEO < + \$10,000
Community Services	Dependant assistance per payment (excl. youth education grants)	Dollar value	< \$5,000	CSM < \$2,000 (+\$3,000 with CEO) Group Chairs < \$500 (+\$1,500 with CSM)	CS Staff and Legatees < \$200 (+\$300 with CSM/ Group Chair)	CEO < + \$5,000
Community Services	Accumulated expenses for a particular Dependant's case (excl. youth education grants)	Dollar value	< \$15,000	CSM < \$5,000	None	CEO < + \$10,000
Community Services	Accumulated expenses for a particular Dependant's case (excl. youth education grants)	Dollar value	< \$15,000	CSM < \$5,000	None	CEO < + \$10,000
Community Services	Education and training assistance for children and young people	Dollar value	< \$5,000 per child, per year above policy	< \$1,000 per child, per year above policy	None	CEO < + \$10,000
Community Services	Capital purchases not funded by a grant	Dollar value	< \$50,000	CSM < \$2,500	None	CEO < + \$10,000

Note: unbudgeted expenditure requires subsequent notification to the Board for endorsement.

4.11.2 The authority of all delegations above are subject to satisfying the requirements of Legacy Brisbane policies related to the specific transaction.

4.11.3 To ensure that all delegates are aware of their authorised limits, the above Delegations table will be provided to all new managers and Group Chairs within 1 month of their appointment to the position.

4.12 Matters requiring Board approval

4.12.1 The following decisions must be referred to the Board for approval:

- Budgets (including detailed background papers);
- Details of any proposed appointment or termination of appointment of any manager reporting to the Chief Executive Officer, whether planned or not. This includes approval to make or terminate the appointment and approval of the proposed person to be appointed or terminated;
- Changes to corporate policy resulting in an impact beyond financial delegations;
- Opening of a new bank account or agreement to a financing arrangement;
- Signatories, including changes to signatories for any bank account;
- Purchase, lease and / or disposal of a premises; and
- Proposed changes in strategic direction.

4.13 Matters to be reported

4.13.1 The following should be reported to the Board or appropriate Board committee for advice, noting, or action as appropriate:

- Staff purchase of a Legacy Brisbane asset being disposed of with a value greater than \$5,000;
- potential legal action against Legacy Brisbane;
- non-routine financial claims against Legacy Brisbane;
- business activities and matters resulting in an impact beyond financial delegations; and
- through the Risk and Governance Committee, the status of the corporate risk profile and changes to the profile.

4.14 Execution of documents

4.14.1 All contracts, documents and written obligations executed by Legacy Brisbane which exceed management's delegated authority must be signed by either two (2) directors or any one (1) director and the Company Secretary for and on behalf of Legacy Brisbane and formally recorded and reported to the Board.

4.14.2 Multi-Year Contracts

All multi-year contracts or agreements need to be referred to the CEO with sign off being:

<i>Length of contract</i>	<i>Within current budget scope*</i>	<i>Within CEO delegation</i>	<i>Approval by</i>
< 5 years	Yes	Yes	CEO
< 5 years	No	Yes	CEO and Treasurer
< 5 years	Yes or No	No	2 Directors or Company Secretary and 1 Director And formally recorded and reported to Board
5 years or more	Yes or No	Yes or No	Board approval

** Something is within current budget scope if the services (goods) are currently budgeted for, if however, the scope of the services are expanded in the new contract compared to what is currently in the approved budget then it will be outside current budget scope.*

4.15 Delegated authority for signing cheques and transferring funds

4.15.1 Legacy Brisbane holds its cash assets in a number of accounts including investment,

operating, gift and imprest cheque accounts.

- 4.15.2 Signing cheques and authorising the electronic transfer of Legacy Brisbane funds is a significant responsibility. Authorised signatories do so on the understanding that they share in the responsibility for the payment or transfer made. This means that an authorised signatory should have a clear understanding of the payment or transfer being made and is obligated to question any invoice, payment or transfer that appears to be abnormal or without sufficient authorisation.
- 4.15.3 The following officers and employees are authorised under this delegation to sign cheques and transfer funds as required (i.e. authorised signatories for the operation of all Legacy Brisbane bank accounts):
- President,
 - Treasurer,
 - Chief Executive Officer,
 - Finance Manager,
 - Community Services Manager,
 - Head of Fundraising, Marketing and Communications, and
 - People and Culture Manager.
- 4.15.4 For all accounts, two such signatories must sign jointly, however any of the Community Services Manager, Head of Fundraising, Marketing and Communications or the People and Culture Manager may sign jointly with each other only if both the Chief Executive Officer and Finance Manager will be absent from Legacy House South Brisbane for longer than is required for a payment to be made. Each such instance is to be reported to the Chief Executive Officer or Finance Manager at the earliest opportunity.
- 4.15.5 Contact Group Imprest cheque accounts are retained with a typical balance of \$2,000 - \$4,000 to facilitate assistance to beneficiaries by Contact Groups. Signatories for these accounts are to be approved by the Board and retained on a list of signatories held by the Finance Manager. Two signatories must sign each cheque or to authorise funds transfers.
- 4.15.6 It is acknowledged that by using a Legacy Brisbane Corporate Credit Card or Debit Card that only one person is authorising the payment; however, in both these instances post expenditure review is required.

PAYMENT REQUEST FORM



Brisbane Legacy | 41 Merivale Street, South Brisbane QLD 4101 | Postal address: PO BOX 3003, South Brisbane BC QLD 4101 | Phone: 07 3029 5600

Payee's details

Payee name:			
Amount:	\$	Date:	
Department: (Place X in box)	☐ Community Service ☐ Fundraising ☐ Admin	☐ Contact Group ☐ Care Group	
Requested by:			

Payment type (please include CRM ID# if known)

☐	Staff reimbursement	☐	Traditional Widow
☐	Family assist	☐	Contemporary Widow
☐	Other	☐	PWD / Explorer

Event related

Event name:		Event date:	
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Applicable grant

Grant name:	
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Urgent payment

☐	No -Pay in normal Thursday payment run	☐	Yes -Please pay by Date:	
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Payment particulars

Description-			
Bank account details (If not already on file)			
BSB:		Account #:	
Account name:			

Managers approval

If approved place X in box:	☐	GL code / budget:	
Signature of manager/supervisor:		Date:	
Notes			

Please attach source documents/Invoices and send to manager for approval.