



ADVANCING BUILT ENVIRONMENT
COST PROFESSIONALS

AIQS BENEVOLENT FUND GUIDELINES

MAY 2017

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1. INTRODUCTION

The AIQS Benevolent Fund helps financial Voting members of AIQS and their families who find themselves in difficult circumstances. The emphasis is on practical support to those who may find themselves in hardship due to injury, illness, accident or disability.

The fund is managed by the Trustees of the Benevolent Fund Trust Deed, who is made up of the Board President, the Immediate Past President and the Vice-Presidents.

People in possible need of assistance are usually brought to the attention of the Trustees by a Council representative or by the individual member. The Trustee then investigate their financial and other circumstances to see whether help might be needed. Should the application be due to ill-health, full medical records/history should be provided. All information provided to the Trustees by any beneficiary of the fund is strictly confidential.

Generally, assistance from the Benevolent Fund is intended to cover an individual's or family's basic needs. The Benevolent Fund is not designed or funded to support multiple requests from a single individual or family. More than one annual request, or multiple requests over time will be considered at the discretion of the Trustees.

2. ELIGIBILITY

Grants are considered where there is clear evidence of financial hardship or difficulty. Each case is assessed, and discussed on its own merit with a full financial breakdown provided by the applicant.

The fund aims to provide assistance to:

- Current financial Voting members
- Injured and disabled current financial Voting members
- Widows/widowers of current financial Voting members
- Immediate children of any of the above

Needs that will not be met by the Benevolent Fund include:

- Business investments, debts or anything that brings financial profit to the individual or family
- Paying off credit cards
- Individuals who are wanted by the law or for paying fines as a result of breaking the law
- Legal fees arising from criminal behaviour
- Gambling debts
- Penalties relating to late payments or irresponsible actions
- School tuition or fees

Voluntary resignation from a member's workplace will not be considered as a case for financial hardship unless it is due to significant health issue/s. Should a Voting member have been made redundant, they may not apply until a minimum period of 6 months has passed since the date of separation, unless the member is critically ill.

3. NOMINATION

Any AIQS financial Voting member may nominate another financial Voting member to receive assistance from the Fund.

The member should contact their local Chapter President, Chapter Secretary, AIQS Representative if overseas, or the AIQS Head Office and provide details of the nominated member's circumstances.

Confirmation of the member's situation will be arranged by AIQS Head Office, through senior local AIQS members who may visit the member to offer support and assistance.

4. GUIDELINES FOR DISBURSEMENT

The Benevolent Fund is intended as a source of last resort, to be used when the member or member's immediate family requesting assistance has explored all other possibilities of assistance from appropriate sources (i.e., family, savings, investments, etc). It is intended to be a means of assistance during the time of a crisis or other hardship.

Disbursements from the Benevolent Fund may not be made in the form of a loan.

The Trustees will not provide help to anyone who, in their estimation, will have negative or irresponsible behaviour reinforced by the financial assistance.

Those requesting help must be willing to grant the Trustees permission to follow up on any of the information provided to them. The Trustees will be sensitive to confidentiality issues.

All disbursements from the Benevolent Fund shall be made directly to the party or entity to whom payment is due and not in the form of cash given directly to the individual or family requesting assistance (e.g., if assistance with rent or a mortgage payment is needed, payment shall be made directly to the individual or family's landlord or mortgage holder).

The Trustees will adjudicate on the nomination and advise those concerned of the outcome. The Trustees reserve the right, at any time, to verify the validity of applications and reserves the right, in its sole discretion, to confer any amount, or none, as they see fit to the applicant, in any way shape or form.

The decision of the Fund Trustees is final.

5. CONTRIBUTIONS TO THE FUND

Donations to the Benevolent fund is currently via voluntary contribution from members and the general public.

If you wish to contribute to the AIQS Benevolent Fund, you may do so in a number of ways:

- One off payments with cheques made out to the Australian Institute of Quantity Surveyors and returned to the address given below together with your signed consent;

OR

- One off payments via EFT to the Australian Institute of Quantity Surveyors together with your signed consent.

CHEQUE DONATIONS

I enclose a cheque for	AUD \$	(insert amount)
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as a donation to the AIQS Benevolent Fund.

EFT DONATIONS

I hereby donate	AUD \$	(insert amount)
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as a donation to the AIQS Benevolent Fund.

Name		Membership ID	
Address			
Company			
Signed		Date	

Please return completed forms to:

AIQS

Level 3, 70 Pitt St

Sydney NSW 2000

Thank you for your support.

6. APPLICATION FOR AIQS BENEVOLENT FUND ASSISTANCE

Applications for assistance can be made by forwarding a completed Benevolent Fund Application Form, a brief one-page cover letter detailing your circumstances, and a copy of your most recent resume to membership@aiqs.com.au. Please ensure that "Benevolent Fund Application" appears in the subject line of your email.

Alternatively, you may post your application marked "Confidential" and send to:

AIQS Benevolent Fund Trustee
Attention: Member Services Officer
L3, 70 Pitt St
Sydney NSW 2000

Full Name of Applicant					
Membership ID					
Address					
Suburb		State		Postcode	
Country					
Mobile					
Date of Birth	(dd/mm/yy)				
Email address					
Marital status					
Number and relationship of Dependants					
Present occupation					

Last two employers (provide dates)

Employer	From	To	Gross monthly salary of previous employment

(Please attach your previous two payslips)

Please attach a copy of your most recent resume.

Amount of assistance requested from fund	\$
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If unemployed, what methods have you taken to secure employment?

Do you expect to be employed within the next three months?

If not, why?

Please describe the present state of health of the person requiring assistance.

Please describe the present state of health of your spouse/partner and dependants.

Please provide details of the nature of circumstances giving rise to the application for assistance.

Have you made a previous application for assistance from this Benevolent Fund? If so, give full particulars.

6.1 ESTIMATED EXPENDITURE FOR THE NEXT 12 MONTHS

REGULAR PAYMENTS	
Mortgage/Rent	
Insurance	
Rates	
Water	
Gas	
Electricity	
Telephone	
Household Food	
Total	

GENERAL	
Regular Medical Supplies	
Clothing	
Car payments	
Loan/Credit Card Repayments	
Travel Expenses	
Other Regular Expenses (provide details)	

Provide details of any other one-off expenses over \$1000	
Total	

6.2 ESTIMATED INCOME FOR THE NEXT 12 MONTHS

REGULAR INCOME	
Earnings from Employment	
Pension	
Income from Property	
Regular Payments/Gifts from Relatives	
Dividends/Interest from Investments/Savings	
Unemployment Benefits	
Sickness Benefit	
Child Benefit	
Housing Benefit	
Other State Benefits	
Other Grants	
Any Other Source of Income (please provide details)	
Total	

ASSETS	
Cash (including bank deposits)	
Stocks, Bonds	
Life Insurance (cash value)	
Real Estate	
Automobile	
Other Liquid or non-Liquid Assets	
Total	

Please provide a brief description of specific purpose this assistance will be used for. If owing to illness, please provide a medical certificate in support of this application and state additional expenditure incurred, if any.

Have you applied for or received assistance from any other Association or person? If so, state particulars.

Provide the name, full address and telephone number of next of kin or someone who may be contacted in an emergency.

Provide details of two character references that may be contacted who are fully acquainted with your present circumstances. For eg, a barrister, solicitor, doctor, priest, accountant, etc.

6.3 DECLARATION

I declare that the statements made above are correct to the best of my knowledge and I undertake to inform the Australian Institute of Quantity Surveyors immediately of any changes in my circumstances. I understand that any payments made to me may be made on an instalment basis, depending on the fund amount granted and the length of time assistance is required. I authorise the Benevolent Fund Trustees and anyone acting on their behalf to make any enquiries deemed necessary in support of my application. I understand that this process may include enquiries of, and disclosure of, information to any relevant medical expert or doctor, any referee indicated on this form and any individual or body that can verify the financial information provided by me. I consent to this.

Signature of Applicant	
Full Name	
Date	