



THE LUCAS FOUNDATION

A helping hand to Sunraysia children and their families

THE LUCAS FOUNDATION

FINANCIAL DETAILS

The Lucas Foundation was established in 2014 to assist seriously ill children and their families in Sunraysia who are suffering financial hardship due to unforeseen circumstances. The Foundation has a limited capacity to assist families of children **12 years and under**.

**if your child is over this age and you feel you fit all of the other criteria please fill out the application form as all applications will be assessed on a case by case basis*

You have been requested to complete this form as the Selection panel of The Lucas Foundation deems that you meet the criteria for assistance.

Please complete the following and forward it to the panel at your earliest convenience.

Should you have any queries please email
admin@thelucasfoundation.org.au

Please complete this Application Form if you feel your child (**Potential Beneficiary**) will qualify for financial assistance from The Lucas Foundation in accordance with the mandate of The Lucas Foundation and the Terms and Conditions set out on page 2 of this Application Form

By submitting this Application Form to The Lucas Foundation you, the Applicant, represent that you have read, and agree to be bound by, the Terms and Conditions set out on page 2 of this Application Form

Please send completed application to:

The Selection Panel
The Lucas Foundation
PO Box 757
Mildura Vic 3502

Terms and Conditions

Criteria

1. As TLF is only permitted to provide funding to beneficiaries that are experiencing financial hardship due to sudden illness unforeseen circumstances, TLF requires all Applicants and Potential Beneficiaries to provide certain information in order that it can assess each Potential Beneficiary's circumstances.
2. TLF reserves the right to reject any Application Form that is not completed in its entirety or does not attach all additional documentation set out on page 9 of this Application Form. It is the sole responsibility of the Applicant to ensure that this Application Form is completed properly.

Selection Process

1. All Applications will be reviewed by an independent selection panel of local professional people. Each Application will be assessed on a case by case basis. If after initial assessment, the selection panel determine the applicant meets the criteria they will request the financial section of the application form be completed and forwarded to them in confidence.
2. On the recommendation of the independent selection panel of TLF, the trustees of TLF will, in its absolute discretion, approve payments from the TLF Fund on such terms and conditions as it sees fit.
3. Any decision by the selection panel and the trustees of TLF relating to payments from the TLF Fund is final and no correspondence will be entered into in relation to such payments.
4. It is anticipated that successful Applicants will be notified no later than 28 days after a complete application is received.

Privacy

1. TLF will comply with the *Privacy Act 1988* in relation to any Personal Information provided to TLF in connection with this Application. Applicants consent to TLF:
 - a. Collecting Personal Information about them and the Potential Beneficiary for the purpose of TLF considering whether to provide financial assistance from the TLF Fund to the Potential Beneficiary; and
 - b. Disclosing any information collected in relation to this Application to:
 - i. TLF's advisors (including its legal and financial advisors); and
 - ii. The media for the purposes of advertising any grant made by TLF.

Should you have any queries regarding a Potential Beneficiary's eligibility for financial assistance, these Terms and Conditions or completing this Application Form, please contact The Lucas Foundation via email admin@thelucasfoundation.org.au

Potential Beneficiary's Details

Please note that all Applications should be complete and submitted by the potential beneficiary's legal guardian.

Child's surname:		
Child's given name(s):		
Postal address:		
Suburb:	State:	Postcode:
Phone number (AH): ()		
Date of birth: / /	Age*:	Gender: M F
*Must be under 12 years of age		

Applicant Details (Legal Guardian)

Title:	Surname:	
First name:		
Postal address:		
Suburb:	State:	Postcode:
Phone number (AH): ()	Mobile:	
Phone number (BH): ()		
Relationship to potential beneficiary:		
Date of birth: / /	Age:	Gender: M F

Financial Circumstances

Applicant's Statement of Current Financial Position:

ASSETS	Market value \$
Bank accounts, savings	
Investments	
Real estate	
Furniture, household goods etc.	
Motor vehicles	
Superannuation benefits	
Other assets:	
Subtotal assets:	\$

LIABILITIES	Currently owing \$
Bank overdraft	
Bank loans	
Personal debts	
Hire purchase	
Credit cards	
Store cards	
Income tax	
Other liabilities:	
Subtotal liabilities:	\$

TOTAL (Assets less Liabilities):	\$
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Applicant's Statement of Income and Outgoings (Monthly basis)

INCOME	Monthly \$
Salary, wages	
Interest and dividends	
Other <i>(please specify)</i> :	
Government benefits (please list, i.e. carers payments etc):	
Subtotal monthly income:	\$

OUTGOINGS	Monthly \$
Rent, mortgage	
Utilities	
Housekeeping, food etc	
Transport	
Medical	
Income tax	
School	
Other living expenses	
Subtotal monthly outgoings:	\$

TOTAL (income less outgoings):	\$
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Financial Declaration

I declare that the Statement of current Financial Position and Statement of Income and Outgoings set out above correctly details my financial position as at the date of completing this Application Form.

Signature: _____

Date: _____