



The New Zealand Anglican Church Pension Board

APPLICATION FOR FINANCIAL ASSISTANCE

The Anglican Church in Aotearoa, New Zealand and Polynesia, as part of its pastoral care for clergy and their families, has entrusted funds to the Pension Board to be used to assist clergy and widow/ers in times of financial need.

In considering an application the Board works closely with the Pension Committee of the relevant Diocese or Hui Amorangi. The Board always asks for a recommendation from the Pension Committee before making a decision. In certain cases the Pension Committee has authority to make the decision on behalf of the Board.

The Board understands that some people are uncomfortable filling out forms, particularly when it involves their personal circumstances. However, to fulfil its trustee obligations the Board must ask certain personal questions to verify that the claim falls within the terms of the trust. All information disclosed will remain confidential.

If you have any queries about making an application you should contact either your Bishop, the Registrar/Administrator, a Pension Committee member or the Pension Board's office.

APPLICANT'S DETAILS

Name:

Address:

Telephone:

Date Of Birth:

 / /

Marital Status:

Number Of Dependent Children (living with the applicant):

QUALIFYING CATEGORY (Please Tick):

Stipendiary Clergy

Retired Clergy

Non Stipendiary Clergy or Minita a iwi

Clergy Widow or Widower

FINANCIAL DETAILS: (MUST BE COMPLETED FULLY & ACCURATELY)

Periodic income and expenditure amounts [eg fortnightly (x26/12), quarterly or annually should be averaged monthly].

AVERAGE MONTHLY HOUSEHOLD INCOME

Stipend, Salary or Benefit (after tax)	\$
Housing allowance	\$
Non-taxable allowances (hospitality, travel, book)	\$
Spouse's Income (after tax)	\$
New Zealand Superannuation (after tax)	\$
Church or other private Pension	\$
Dividends & Interest	\$
Rental Income	\$
Other Regular Income (please specify)	\$
	\$
TOTAL NET INCOME	\$

AVERAGE MONTHLY HOUSEHOLD EXPENDITURE

Household Costs (eg power, gas, phone, rates, maintenance)	\$
Living Expenses (eg food, groceries, clothing)	\$
Motor Vehicle Expenses (eg fuel, maintenance, car insurance, registration - less reimbursed travel costs)	\$
Insurance Premiums (eg house, contents, health, life)	\$
Mortgage	\$
Rent Payments	\$
Credit Card, Hire Purchase, Loan Repayments	\$
Retirement Savings	\$
Offerings & Donations	\$
Other Regular Expenditure (please specify)	\$
	\$
TOTAL EXPENDITURE	\$

Please list your household's

Assets Or Investments

Liabilities

Property - Value	\$	Mortgage - Principal	\$
Private Savings	\$	Hire Purchase	\$
Shares	\$	Credit Card Total	\$
Term Deposits	\$	Other Loans	\$
Rental Property	\$	Other	\$
Other	\$		\$

CLAIM DETAILS

Amount Applied For:

\$

What Particular Expense(s) Do You Need Assistance With?

(please give full details, attaching a further page if necessary, and attach evidence of cost)

What Help Have You Sought From Other Agencies (eg WINZ, other Church Trusts)?

DECLARATION

I declare that the information supplied is true and complete. I have not withheld any information on my financial position that may affect the Board's decision on this application. I authorise the Board or its agent to make such enquiries as they deem necessary in order to verify the details set out in my application.

I agree that the information provided on this form be given to the Board in order to assess my eligibility for a grant. I understand the information will be confidentially retained by the Board but will only be used for administration and statistical purposes.

Signed _____

Date _____

This page is to be completed by the Pension Committee in conjunction with the Checklist in the Pension Committee Guide

Name of Diocese or Hui Amorangi supporting this application:

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Has the Diocese / Hui Amorangi provided any financial assistance in addition to the amount applied for?

Yes	/	No
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If Yes, how much was provided? \$ _____.

Can a church trust provide any financial assistance in addition to the amount applied for?

Yes	/	No
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Is the committee satisfied that the information & financial details are correct?

Yes	/	No
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(If NO please comment below and insert new figures alongside current figures under Financial Details)

Is the Pension Committee satisfied that the applicant does not need budgetary advice/intervention?

Yes	/	No
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(If NO please state what recommendations you have made to the applicant.)

Is this application supported by the Diocesan Pension Committee?

Yes	/	No
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Amount of assistance recommended by the Pension Committee: \$ _____

RECOMMENDATION: *(As recorded in Committee's minutes)*

ANY FURTHER COMMENTS:

Chairperson (or representative) of PENSION COMMITTEE
Contact Address:

DATE: _____

Phone:

E-mail:

Once the Pension Committee has made a decision and this has been recorded here, please return the completed application form together with any supporting documentation to:

**The Funds Administrator,
New Zealand Anglican Church Pension Board,
P O Box 12-287,
WELLINGTON 6144**

Fax (04) 473 9991

Ph (04) 473 9369