

Ballardong Native Title Charitable Trust **Distribution Policies**

SUMMARY OF DISTRIBUTION POLICIES FOR FY24

Advisory Trustee Committee Members			
Michael Hayden	Markques Ugle	Dwayne Hayden	Reg Yarran
Diana Ponton	George Hayden	Norman Pickett	

BACKGROUND/ GENERAL INFORMATION

Application forms are to be presented to either Australian Executor Trustees Ltd (AET) or an Advisory Trustee Committee Member (Advisory Trustee) to forward to AET. If the member is not able to sign the application form, then an Advisory Trustee is able to sign on their behalf.

Applications received outside the scope of the current distribution policies can only be considered at a meeting of the Advisory Trustees or by circulating resolution where the majority of Advisory Trustees must approve before funding can be provided.

AET Contact Information

Visit: Level 3, 28 The Esplanade, Perth

Phone: 1800 078 680 (Free Call). Phone lines open 9am - 1pm weekdays

Fax: (08) 9481 6148

Email: ballardong@aetlimited.com.au

MEMBERSHIP

The Advisory Trustees are to advise AET if a person is considered a Ballardong Member. The procedure for determining Membership is outlined below:

Membership Procedure

- Applications are first sent to Advisory Trustees to seek approval.
- If Advisory Trustees approve, no further confirmation is required.
- If Advisory Trustees cannot confirm membership, then further information may be requested from the applicant to support their connection to Ballardong.

1. **FUNERALS**

A total of **\$200,000** is available for this policy which is funded from the Funeral Account.

A payment of up to **\$2,000** may be made towards the funeral costs of a deceased Ballardong Member.

This policy was created specifically for the payment of funeral director's costs and AET will make payment directly to the funeral director upon receipt of a tax invoice. Costs can be refunded to any other person upon production of a receipt, however AET will first ensure the funeral director has received full payment before consideration can be given to refunding any individual.

Costs for a wake cannot be considered within the scope of this policy, nor is assistance available for Members to travel to attend a funeral.

Applications require approval by a majority of Advisory Trustees before funds can be released.

No applications can be considered outside of the Current Policies due to funding constraints, unless the trust's financial circumstances significantly change.