



OBrien Real Estate Foundation

OBRIEN REAL ESTATE FOUNDATION PTY LTD A.C.N 625 344 121 is an Charitable Ancillary Fund which has been set up for the purpose of providing money, property and benefits to DGR's (Deductible Gift Recipients) also known as Charities or Not For Profit groups.

This information sheet is designed to help you determine if your organisation or group meets eligibility requirements and if your grant application will meet our grant guidelines and funding principles.

Who do we support?

If your community purpose is in alignment with our Purpose and Values, and your organisation holds Deductible Gift Recipient Status, we will welcome a grant application for consideration by the OBrien Real Estate Foundation Committee & Board of Directors.

The OBrien Real Estate Foundation gives preference to organisations and projects that:

- Are already supported by OBrien staff & OBrien Offices
- Are initiated by OBrien staff in association with community organisations in which they are already actively involved
- Projects and organisations that are in close proximity to an OBrien Real Estate Office

The OBrien Real Estate Foundation aims to fund specific projects (preferred amount of up to \$5,000) in the following areas:

- Education
- Community Sporting Activities
- Community Support & Aid Groups
- Medical Research and Support Groups
- Innovative projects from local community organisations

In addition to supporting major charity groups, such as MND Victoria, Beyond Blue, Wildlife Victoria, and Foodbank

When do we issue grants?

The OBrien Real Estate Foundation receives grant applications supported by our OBrien Offices, with requests to be lodged by the 30th June, 30th September, 31st December, and 31st March each year. The Foundation Committee then reviews all applications and makes recommendations to the Foundation Board for final approval. Successful grant recipients will be notified by their supporting OBrien Office within one month after application closing dates.

What we can't consider:

The OBrien Real Estate Foundation cannot consider requests from:

- Individual applicants
- Political organisations
- Religious or sectarian organisations involved in purely religious/sectarian activities (with the exception of projects which benefit the wider community)
- Foundations that are themselves grant making bodies



Information for Non Profit Groups – Deductible Gift Recipients

In broad terms, Deductible Gift Recipients fall under the following categories as defined by the Australian Taxation Office [Types of DGRs | Australian Taxation Office](#)

- Health
- Education
- Research
- Welfare and rights
- Defence
- Environment
- The family
- International affairs
- Sports and recreation
- Cultural organisations
- Fire and emergency services
- Ancillary funds

Who can receive tax deductible gifts or contributions?

Organisations or agencies who are endorsed (approved) by the Australian Taxation Office (ATO) or named in tax law as 'Deductible Gift Recipients' (DGRs) may receive:

- tax deductible gifts, such as financial donations, and
- tax deductible contributions, such as the purchase of a ticket to attend a fundraising event.

Also, some donor organisations and grant makers can only fund DGRs.

The OBrien Real Estate Foundation falls into this category.

More information about DGR status can be obtained from the Australian Taxation Office: [ATO Non Profit](#)

Is your organisation eligible for DGR endorsement?

Organisations endorsed as DGRs are entitled to receive gifts which are deductible from the donor's income tax. DGRs are either:

- endorsed by the ATO and fall in a general DGR category
- or, in exceptional cases, listed by name in the tax law.

There are some requirements you have to meet before your NFP can be endorsed by the ATO as a DGR.



Applying for a Grant - OBrien Real Estate Foundation

Completed applications are to be submitted through a local OBrien Real Estate Office/Staff Member to the Foundation

Applications must provide the following information, including required attachments, in order to be considered:

Name of organisation:

ABN number:

Postal address:

Street address:

Telephone number:

Authorised contact person's details:

Name & title:

Telephone number:

Email address:

OBrien Real Estate Office:

Name of Affiliated OBrien Real Estate Office:

Name of Affiliated OBrien Real Estate Staff Member:

Phone number of OBrien Real Estate staff member:

Email address of OBrien Real Estate staff member:

Funding Requirement:

Our preferred funding commitment is currently capped at \$5000.00 per grant, however all applications will be considered on their merits.

Grant amount the organisation is seeking:

How will these funds make a difference to the Organisation?

Explain the funding request & how it will make a difference. Information that you can provide in support a grant application will assist the Trustees to make a final decision.

Additional information required:

Please provide the purpose of the organisation, and who benefits from the organisations activities:



Applicant's declaration: I, (insert full name)

Confirm that I am authorised by the organisation to make this application on its behalf and say that all the information provided is true and correct. I have read the terms and conditions relating to the application for a grant from the OBrien Real Estate Foundation, and agree to those terms and conditions, including the privacy statement and consent to use of personal information which can be found here: [Privacy Policy](#)

Signature:

Date:

Have you attached the following items?

- DGR status confirmation – organisation must hold Deductable Gift Recipient Status
- Written references if available
- Any other relevant information