

Frequently Asked Questions: Mount Wellington Charitable Trust

The Mount Wellington Charitable Trust reserves the right to edit the following FAQs from time to time. The following guidelines are current at 26 June 2026.

Background

Historically the Mount Wellington Licensing Trust distributed operational profits from its hotel and hospitality venues to the local community through the Mount Wellington Charitable Trust. Over the years this work supported a variety of causes, including community events and local initiatives.

In 2024, the Mount Wellington Licensing Trust made the difficult decision to divest its hospitality assets - the Waipuna Hotel & Conference Centre and the Panmure Historic Hotel - to focus on enhancing its community giving initiatives on a more regular basis with meaningful and targeted grants for the local community.

Preparing for your application

What are the eligibility criteria?

To be eligible to be considered for funding organisations (registered charitable organisations, incorporated societies, clubs and/or other public benefit organisations) must be:

1. Based within the Mount Wellington Licensing Trust area. OR
2. Delivering services to directly benefit residents of the Mount Wellington Licensing Trust area.

Please note that individuals are not eligible to receive funding. An individual can not be paid grant funding, even if they are associated with an organisation. Grant recipient organisations must hold a bank account under the ownership of the organisation.

Purposes of the Mount Wellington Charitable Trust

All applications must fulfil one or more purposes of the Mount Wellington Charitable Trust. The purposes of the Mount Wellington Charitable Trust are:

- a. First object: to relieve poverty by:
 - i. caring for the aged, children and orphans;
 - ii. caring for the infirm, blind or veterans or disabled persons;
 - iii. caring for intellectually disabled discharged prisoners or alcoholics;
 - iv. helping other needy persons (for example refugees or food banks).
- b. Second object: to advance education by:
 - i. providing education through early childhood centres, schools and universities;
 - ii. providing scholarships and prizes for academic achievement;
 - iii. providing or improving facilities for schools or universities;
 - iv. developing the character of young people.
- c. Third object: to advance religion by:

- i. providing and maintaining grounds and buildings to be used by churches or other religious organisations;
 - ii. celebrating religious services in public;
 - iii. supplying religious literature;
 - iv. providing religious education.
- d. Fourth object: to be beneficial to the community by:
 - i. assisting organisations supporting amateur sport;
 - ii. assisting organisations supporting arts and cultural activities;
 - iii. assisting Philanthropic organisations.
- e. Fifth object: to provide at the Trustees' absolute discretion, any income for charitable purposes in New Zealand only, to charities registered under the Charities Act 2005 or any subsequent Act that amends or replaces it;
- f. Sixth object: to provide, directly or indirectly, a public benefit to the community whilst carrying out the objects under clause 3.1 of the MWCT Trust Deed; and
- g. Incidental matters: all things incidental to the charitable purposes described in clause 3.1 of the MWCT Trust Deed.

What is excluded from consideration? Are there any exceptions?

The following are ineligible to receive funding from the Mount Wellington Charitable Trust:

- Projects not based within (or delivering services to residents) the advertised Mount Wellington Licensing Trust area.
- Projects that have already been fully funded.
- Projects that have already been completed.
- Projects which are seen as the responsibility of central/local government.
- The payment of debt, refinancing of loans or endowments.
- Projects requested by organisations which have significant financial resources, where the project could conceivably be funded by the organisation out of its own resources/reserves.
- Applications from individuals. **All applications must be put forward by a community organisation.**

Can I apply for activities that are already underway?

Applications must be for activities taking place after the closing date of applications. For example, if you are applying for funding in the application round taking place from 3 July – 28 August 2026, the purpose of funding must be for activities taking place after 28 August 2026. Funding for phased projects that are in progress will be considered, however funds should only be applied to parts of the project taking place after 28 August 2026.

Boundaries

The Mount Wellington Licensing Trust area is indicated in the map below. If you find it difficult to determine whether your organisation is within the boundary line, please email philanthropy@pgtrust.co.nz with the address of your activities and we will check for you.

For a written boundary road reference, please see the information at the end of the FAQs.



Submitting your Application

How do I apply?

All applications must be completed online via the Perpetual Guardian Funding Hub. If you do not have an account with the Perpetual Guardian Funding Hub, you will need to register for one for your organisation before you apply. Applications must be made under your organisation's legal name. Multiple staff can register and have access to an organisation's 'dashboard.' You can register here at <https://perpetualguardian.fluxx.io>. Please allow for up to three working days for your registration to be processed.

What are the timeframes?

Currently, applications to be considered as a recipient for funding are assessed biannually. Applications are scheduled to open from December – February and July – August approximately. Precise dates are confirmed closer to the application round timing.

The next available application round is 3 July – 28 August 2026.

Due to the consultative nature of this Trust, application outcomes take a little longer than our usual timeframes.

We anticipate outcomes for the next application round being available in late September / early October 2026.

How much should I apply for?

We recommend that you take into consideration any value guidelines that are published with the online application form for each grant round. The limit on funding is outlined below.

In the July/August 2026 funding round, The Trust will consider applications for 'General Grants.' We anticipate a grant range of approximately \$1,000 - \$36,000, noting no single grant will be more than 1/10th (10%) of the available funds.

GST

Mount Wellington Charitable Trust intends that all grants are provided as unconditional gifts (donations) for GST purposes. As such, they are not payments for goods or services and do not attract GST.

It is the responsibility of each applicant to ensure they request the appropriate amount of funding based on their organisation's GST position. If you are unsure, you should seek advice from a qualified advisor.

Please consider the following when applying:

- **If your organisation is GST registered:** Apply for the **actual cost of the project exclusive of GST**, where your organisation is able to claim GST on expenses incurred.
- **If your organisation is not GST registered:** Apply for the **total cost of the project inclusive of GST**, as GST will be a real cost to your organisation.

Can I apply for funding if I applied in the previous application round?

- If you were declined in the previous application round, please feel welcome to apply again.

- If you were approved in the previous application round, yes, you can apply again, with the following caveats:
 - The grant funding expenditure should be complete and the work associated with the approved grant should be complete (or if it relates to an ongoing/long-term project or programme, progression to a satisfactory level).
 - Your grant reporting must be up to date.
- Keep in mind that each funding round generates a group of new requests; therefore, previous grant outcomes are not an indicator of future grant outcomes.

Can I apply for multi-year funding?

- Organisations can apply for multi-year funding.
- A maximum of five years of funding will be considered.

What kind of request can I put forward for a multi year grant?

- Multi-year grants are reserved for high impact projects.
- Multi-year grants could be 2–5 years in duration.
- Multi-year funding requests must be connected to a multi-year project with clearly articulated goals and milestones i.e. not funding for business as usual.
- Applications should demonstrate project development year on year.

How do multi-year grants work?

Subsequent grant instalments will only be paid upon satisfactory development and expenditure in required annual reporting.

How will I know if I have provided enough information in my application?

A number of questions and required documents in the application form are compulsory, to ensure sufficient information is received for review by the Mount Wellington Charitable Trust Granting Committee.

During the assessment period, the Mount Wellington Charitable Trust may request further clarification from the applicant/s regarding their application. Perpetual Guardian's Philanthropy Team may reach out to you to request any further information if required.

What documents should I provide?

All applicants will be required to provide the following documents:

- Project specific budget (we request this is provided in pdf. format, not excel).
- Project specific quotes/cost documentation.

Applications for \$10,000+ will also be required to provide:

- Latest financial statements (if these are part of a full annual report, we kindly request you extract the financial statements for upload).

Applications from organisations which are not registered charities will also be required to provide:

- Letter of support from a community partner (or reputable aligned organisation).
- Letter of support from someone who uses your service.

There is also an opportunity to upload additional supporting documentation.

We recommend only supplying information pertinent to the funding application. The Trust does not require annual reports.

The Trust does not require a board resolution to apply, or a certificate of charities registration.

Please note:

- We highly recommend you combine documents of similar types into one pdf file (for example, photographs).
- PDFs files are the only acceptable file type.
- Label your files clearly and concisely with no special characters.
- Ensure your documents are under 25MB.

Terms and Conditions and Privacy Policy

When you submit an application to the Mount Wellington Charitable Trust you will be required to acknowledge and agree to Perpetual Guardian's [Grant Terms and Conditions](#) and [Privacy Policy](#) which are also applicable to Mount Wellington Charitable Trust applications and grants.

Please note that applications to the Mount Wellington Charitable Trust will be vetted by Perpetual Guardian's Philanthropy Team before being considered by the Mount Wellington Charitable Trust Granting Committee. The Mount Wellington Charitable Trust Granting Committee is made up of the elected Members of the Mount Wellington Licensing Trust.

After the application

How will I know the outcome

The grant writer (the person who has submitted the application) will receive an email confirming the outcome and any next steps you will need to take if you are successful. Due to the consultative nature of this Trust, application outcomes take a little longer than our usual timeframes. You will be able to check the expected outcome date on your Perpetual Guardian Funding Hub dashboard during the post application period.

When and how will our organisation be paid?

Your organisation will need to provide some compliance items in order to be paid. At a minimum this includes:

- Formal proof of bank account. The bank account must be 'owned' by the organisation, not an individual, regardless of that individual's role in the organisation. It is expected that bank account owner and name will match the organisation name.

We will provide you with details on requirements if you are successful with your application. It is important that you provide the compliance items in a timely manner.

If you have already received a recent grant from a Perpetual Guardian managed Trust and your details haven't changed, you won't need to provide these items.

Do you provide feedback on unsuccessful applications?

Regrettably, due to the number of applications received, we are unable to provide detailed feedback on unsuccessful applications. Please note the decision of the Mount Wellington Charitable Trust is final and not subject to any appeals process.

How do I acknowledge a grant from the Mount Wellington Charitable Trust?

The Trust's logo will be available for successful applicants to acknowledge the support of the Trust, with brand guidelines to follow. The Mount Wellington Charitable Trust appreciates the opportunity to approve acknowledgements where possible. Please email

philanthropy@pgtrust.co.nz to secure approval. In instances where space for a logo is not available, please use the following format *Proudly funded by the Mount Wellington Charitable Trust*.

When do we have to utilise the funds by?

It is expected that funds will be utilised within a 12 month time period of the funding being confirmed. Any extension of utilisation of funds will be only in consultation with the Mount Wellington Charitable Trust.

What are the reporting requirements?

It is a requirement that grantees submit an accountability report by the end of the next application period, or at the conclusion of the activities, whichever of these occurs first. Reporting is required regardless of project and expenditure timeframes. For example, 2025/2026 grant recipients will be expected to complete a report by the application closing date of the first 2027 granting round (and annually thereafter until the project is complete).

What happens if we want to use the grant for a different purpose or we need more time for the project?

If your organisation would like to use the grants for a different purpose, or you need more time to carry out the project, please submit this information via an online report on your Perpetual Guardian Funding Hub dashboard. Perpetual Guardian will liaise with the Mount Wellington Charitable Trust who will consider your request.

Will the Mount Wellington Charitable Trust help us promote our project?

The Trust wishes to help promote the projects and causes that it funds (where possible) in order to assist support for the work. The Trust may do this through a range of methods including word of mouth, its website, social media, and the media. This will be managed by Mount Wellington Charitable Trust staff. Please contact comms@mwct.nz to learn more.

I need support. Who should I contact?

If you need support or have a question in the first instance please contact Perpetual Guardian's Philanthropy Team:

- Email: philanthropy@pgtrust.co.nz
- Free phone: 0800 737 738
- DDI: 09 909 5219

Mount Wellington Licensing Trust area – indicative road boundaries.

Northern Boundary

- Lunn Avenue / Ngahue Drive (Ellerslie–Stonefields area).
- Pilkington Road (Tamaki area).
- Tripoli Road / Dunkirk Road (Tamaki River edge).

Eastern Boundary

- Follows the Tamaki River south past Mount Wellington War Memorial Park, continuing along Panama Road and Waipuna Road East toward the Panmure Basin.

Southern Boundary

- Great South Road / Portage Road intersection (Mount Richmond area, near Mount Richmond Hotel).
- Connects toward Panama Road and Carbine Road, linking into the southern access to Sylvia Park.

Western Boundary

- Great South Road / Penrose Road intersection (near Media Stadium and Penrose).
- Runs up Penrose Road, connecting to Lunn Avenue and Ngahue Drive, completing the loop north.

Key Crossroads / Anchor Points

1. Lunn Avenue & Ngahue Drive – northernmost boundary
2. Pilkington Road & Tripoli Road – northeast corner
3. Panama Road & Waipuna Road – southeast corner
4. Great South Road & Portage Road – southern point
5. Penrose Road & Great South Road – southwestern corner.