



## Introduction to Form 5 Application by single entity for registration as a charitable entity

*Section 46, Charities Act 2005*

*This is an application form for a “parent” organisation wishing to register a group of organisations as a “single entity” under the Charities Act 2005. Complete it after you have made a submission to the Charities Commission and terms and conditions have been set for your group.*

*Completing this form is the second stage of the application process for a group.*

*Before you begin to fill out this form, please take a few moments to read the notes below.*

### **How do I use this form?**

We have written guidance notes for each question to help you to complete your answers and find some of the information you will need.

You should have a copy of the terms and conditions, set by the Commission for your group, with you when you fill out this form. These will tell you which sections you should complete and which to leave blank.

### **What is the purpose of this form?**

It collects information about a group (single entity) for inclusion on the Charities Register. It also collects information for statistical purposes to help the Charities Commission to meet its obligations under the Charities Act.

### **When should I use this form?**

Completing Form 5 is the second stage of the application process for a group. Complete it after you have made a submission to the Charities Commission and terms and conditions have been set for your group.

See Fact Sheet 11 – *Group Registration – an overview* for more information.

### **Who should fill out this form?**

The parent applying on behalf of a group will need to fill out this form. Anyone in the parent organisation can complete this form, as long as they have been asked (authorised) to do so.

### **Who should sign this form?**

One of the officers named in the answer to question 23 of the parent organisation’s Group Member Information Form must sign this form to certify that they are authorised and that the information is correct.

## What if I haven't got all the information you need?

We cannot process incomplete application forms so you must make sure that you have answered all of the questions that apply before you send us this form.

Once you have completed this form, send it, with supporting documents if required, to the address below.

## What address should I post this form to?

Charities Commission  
PO Box 8072  
Wellington 6143.

## Can this form be completed online?

No, because of the complexity of the group registration application process the Commission will only accept this form on paper. If you wish, you can visit our website at [www.charities.govt.nz](http://www.charities.govt.nz) to view and print a copy of this form.

## Where can I get other copies of this form?

You can print copies from our website, [www.charities.govt.nz](http://www.charities.govt.nz).

If you prefer, you can request paper copies by emailing [info@charities.govt.nz](mailto:info@charities.govt.nz) or by calling our free information line 0508 242 748. Photocopied forms are acceptable.

## What supporting documents do I need to provide?

Check the terms and conditions set by the Commission for your group to see if they require you to include any supporting documents.

## How long will it take to process this application?

Once we have everything we require, we envisage it will take about 30 working days.

## How will I know if this application is successful?

We will send registration certificates, including unique registration numbers, for the single entity and each member of the group to the address you give us in answer to question 4 of this form.

## How will I know if there is a problem with the application?

If we need more information, we will contact you.

## Will all of the information I provide with this application be available to the public?

Your answers to questions 1 to 18 will be available for the public to see on the Charities Register. If the terms and conditions for your group require any documents to be part of this application, these documents will also be available for the public to see on the Register.

The Charities Commission may restrict public access to information on the Register if it believes it is in the public interest to do so. If you would like any of the information in your application restricted from public access, please include a written request with this application explaining your reasons. The Commission will consider your request and let you know its decision in writing.



## Guidelines for questions 1–4

### Single entity details

1

This is the name you agreed to use for the single entity in the submission process. You will find it in the terms and conditions set for your group.

2

This is the parent's legal or most formal name. It is the name the parent is registered under if it is already an incorporated society, a registered charitable trust, or a company.

It should be the name used on the parent's formal documents such as its rules, trust deed or other governing document. There may be a clause in the parent's rules that states its full and correct name.

It is important to include words like "The", "Te", "Trust", "Inc", "Incorporated", "NZ", or "New Zealand" if they are part of the name.

3

A single entity is unlikely to have any other names. Fill this in if it does have another name, if it does not, write "N/A".

4

This is the address we will send formal correspondence to. This must be the postal address of the parent organisation.

Please complete the parent organisation's postal address details in full.

If the parent organisation has a street address that is different from its postal address, please enter it here.

SAMPLE



## Guidelines for questions 5–7

5

You do not have to give us these optional contact details but you may wish to have them available on the Charities Register so the public knows who to contact in relation to the single entity. These would usually be the contact details of the parent organisation.

If you do not wish to have these optional details on the Register please leave this section blank.

6

Use the date set by the Commission in your terms and conditions.

7

This information relates to those organisations the Commission has agreed will be treated as a single entity. You will find these details on your copy of the *Group Member Information Forms*. If you have more than five entities please either use a separate sheet or take a photocopy of question 7 before you begin.

SAMPLE



## Guidelines for questions 8–9

8

If any of the organisations you listed in the answer to question 7 are already registered with the Charities Commission, enter their names and Charities Commission registration numbers here. You will need to get these details directly from the organisation or from the Charities Register at [www.charities.govt.nz](http://www.charities.govt.nz).

### Charitable purpose Sectors

9

You may need to combine the answers given by each organisation in their *Group Member Information Form* to make one answer for the single entity.

For example, if there are two members in the group and the first has ticked three options, and the second has ticked three other options, you will need to combine these and tick six options to identify the single entity's sectors.



## Guidelines for questions 10–14

10

From the options you have ticked in answer to question 9, pick the one you think is the main sector of operation for the single entity.

### Activities

11

You may need to combine the answers given by each organisation in their *Group Member Information Form* to make one answer for the single entity.

For example, if there are two members in the group and the first has ticked three options, and the second has ticked three other options, you will need to combine these and tick six options to identify the single entity's activities.

12

From the options you have ticked in answer to question 11, pick the one you think is the main activity of the single entity.

### Beneficiaries

13

You may need to combine the answers given by each organisation in their *Group Member Information Form* to make one answer for the single entity.

For example, if there are two members in the group and the first has ticked three options, and the second has ticked three other options, you will need to combine these and tick six options to identify the single entity's beneficiaries.

14

From the options you have ticked in answer to question 13, pick the one you think is the main beneficiary of the single entity.



## Guidelines for questions 15–16

### Sources of funds

15

You may need to combine the answers given by each organisation in their *Group Member Information Form* to make one answer for the single entity.

For example, if there are two members in the group and the first has ticked three options, and the second has ticked three other options, you will need to combine these and tick six options to identify the single entity's sources of funds.

### Areas of operation

16

You may need to combine the answers given by each organisation in their *Group Member Information Form* to make one answer for the single entity. For example, if one member of the group covers all the North Island regions, and the other member covers all the South Island regions, you would answer "Nationwide".

SAMPLE

Sources of funds

**15** From which of the following sources does the single entity get or intend to get funds?  
 Please select as many boxes as needed.

<input type="radio"/> government grants / contracts	<input type="radio"/> other investment income
<input type="radio"/> income from service provision	<input type="radio"/> any other grants and sponsorship
<input type="radio"/> income from trading operations	<input type="radio"/> membership fees
<input type="radio"/> donations / koha	<input type="radio"/> bequests
<input type="radio"/> New Zealand dividends	
<input type="radio"/> other (please state) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

Areas of operation

**16** Where does the single entity operate or intend to operate?  
 Please select as many boxes as needed.

**New Zealand**

Nationwide

**Or less than nationwide**

<input type="radio"/> Northland	<input type="radio"/> Wellington–Wairarapa
<input type="radio"/> Auckland	<input type="radio"/> Nelson–Marlborough–Tasman
<input type="radio"/> Waikato	<input type="radio"/> West Coast
<input type="radio"/> Bay of Plenty	<input type="radio"/> Canterbury
<input type="radio"/> Gisborne	<input type="radio"/> Otago
<input type="radio"/> Hawke’s Bay	<input type="radio"/> Southland
<input type="radio"/> Taranaki	<input type="radio"/> Chatham Islands
<input type="radio"/> Manawatu–Wanganui	

**Overseas**

<input type="radio"/> Oceania	<input type="radio"/> Antarctica
<input type="radio"/> Asia	<input type="radio"/> South America
<input type="radio"/> Africa	<input type="radio"/> North America
<input type="radio"/> Europe	

## Guidelines for questions 17–18

17

Unless the terms and conditions set for your group say otherwise, please answer “N/A” to this question.

### Rules

18

Check the terms and conditions set by the Commission to see if the single entity is required to have separate rules. If they do, please supply a copy of the rules.

### Certification

One of the officers named in the answer to question 23 of the parent organisation’s *Group Member Information Form* must sign this form to certify that they are authorised and that the information is correct.

### Reminder

We cannot process incomplete application forms so you must make sure that you have answered all of the questions that apply before you send us this form.

SAMPLE



## Request for information on Register to be restricted from public access

The Charities Commission may restrict public access to information on the Charities Register if it believes it is in the interest of the public to do so. If you would like any of the information in this application restricted from public access, please include a written request explaining your reasons with this application. The Commission will consider your request and let you know its decision in writing.

Yes, we wish to submit a written request to restrict information from public access.

### Please note:

- The Charities Commission may, under section 25 of the Charities Act 2005, prevent or restrict public access to information or documents if it considers it to be in the public interest to do so. Please note that this information or these documents will still be subject to requests under the Official Information Act 1982 that will be considered by the Charities Commission on a case-by-case basis.
- All requests to prevent or restrict public access to information or documents will be evaluated and you will be advised of the Charities Commission's decision.

## Privacy and information use

The information that you have provided in this form will be held and used by the Charities Commission to determine your eligibility for registration and to carry out its functions under the Charities Act 2005.

The Charities Act 2005 authorises the supply of information or documents held on the Register of charitable entities to the Inland Revenue Department to assist in the carrying out of powers and functions under any of the Inland Revenue Acts.

The Statistics Act 1975 allows for the information, once collected, to be used for statistical purposes by Statistics New Zealand. Information supplied to Statistics New Zealand will be used for statistical purposes only and will be arranged to prevent particulars published about any person from being identifiable (except by the person who supplied the information), unless the person has agreed or publication identifying the person is unavoidable.

The Privacy Act 1993 provides that you may access or correct personal information about you held by the Charities Commission. If you wish to access or correct your personal information, please contact the Charities Commission, PO Box 8072, Wellington, 6143.

## Where to send your application

Please post this completed form and supporting documents, if required, to:

Charities Commission  
PO Box 8072  
Wellington 6143.