

# People's Trust Victoria

## Procedures Guidelines

### Step 1

Please read our Constitution and Frequently Asked Questions as shown on the website: <https://peoplestrustvictoria.com>

### Step 2

Download and print either the Individual or the Corporation Disclosure and Agreement form (whichever is appropriate).

Read and complete your name and contact details on the form, then sign it.

If Rates or other notices are in joint names, both individuals should sign the Form.

Member and Receipt Numbers at the bottom of the form are allocated by the Trust.

If your notice relates to Fines Victoria you should also download the Third Party Authorisation form from our website and enter your details on the right hand side, then sign and date the form. If applicable this form should be sent as shown in Step 5

### Step 3

Deposit \$10.00 for each Request to Pay or Invoice as an administration donation to:

People's Trust Victoria

BSB 633 000

Account 194 408 167

Include your name as the reference.

Take a screenshot of the bank deposit receipt and send this as indicated in Step 5.

### Step 4

Ensure you read and understand the Undertaking to Pay section of the Disclosure Form. This means you do not need to send a Cheque to the Trust.

If you prefer to use a cheque, write out a personal cheque payable to "People's Trust Victoria" for the full amount of the request for payment. Do not use a Bank Cheque.

### Step 5

Make a photocopy of the following and email them to [contact@ptvic.com](mailto:contact@ptvic.com)

- a) Disclosure and Agreement form (signed)
- b) Third Party Authorisation form (Only applicable for Fines Victoria)
- c) Invoice/Notice
- d) Drivers Licence or passport (And Cheque if applicable)
- e) Donation Deposit screenshot

## Step 6

Post the following documents to the Trust to the address shown below:

1. Original Disclosure and Agreement form and the original Third Party Authorisation form (If Applicable)
2. A photocopy of your Driver Licence or Passport
3. A copy of The Invoice/Notice
4. A copy of the Donation Deposit
5. Personal cheque (Only if you are using this rather than Undertaking to pay).

Address for correspondence: Peoples Trust Victoria  
PO Box 4312  
Frankston Heights VIC 3199

For Rates, and other requests (Not Fines Victoria) you will be asked to sign an Enduring Power of Attorney once your documents are received.

### **CLARIFICTION NOTES**

**When posting, please make sure you include:**

- Original Signed Disclosure and Agreement form
  - Third Party Authority (If applicable)
  - Copy of ID (Driver Licence or Passport)
  - Copy of Invoice
  - Reference/screenshot/date of donation
- Please ensure you have sufficient funds in your bank account to cover the value of the Undertaking to pay the date you sign the Disclosure Form.
  - Donations can also be made by cash, in person as MyPlace Frankston or MyPlace Yarra Valley.
  - Ensure your contacts details are on Disclosure forms if follow up is required.
  - Please ensure both parties sign the Disclosure form where the rates or other notices are in joint names.
  - Please read through the information on the website in regard to the Constitution, Frequently Asked Questions and the Disclosure and Agreement form as this will give you the information and reduce the need for follow up.
  - Web address: <https://peoplestrustvictoria.com>
  - Postal Address: Peoples Trust Victoria  
PO Box 4312  
Frankston Heights VIC 3199