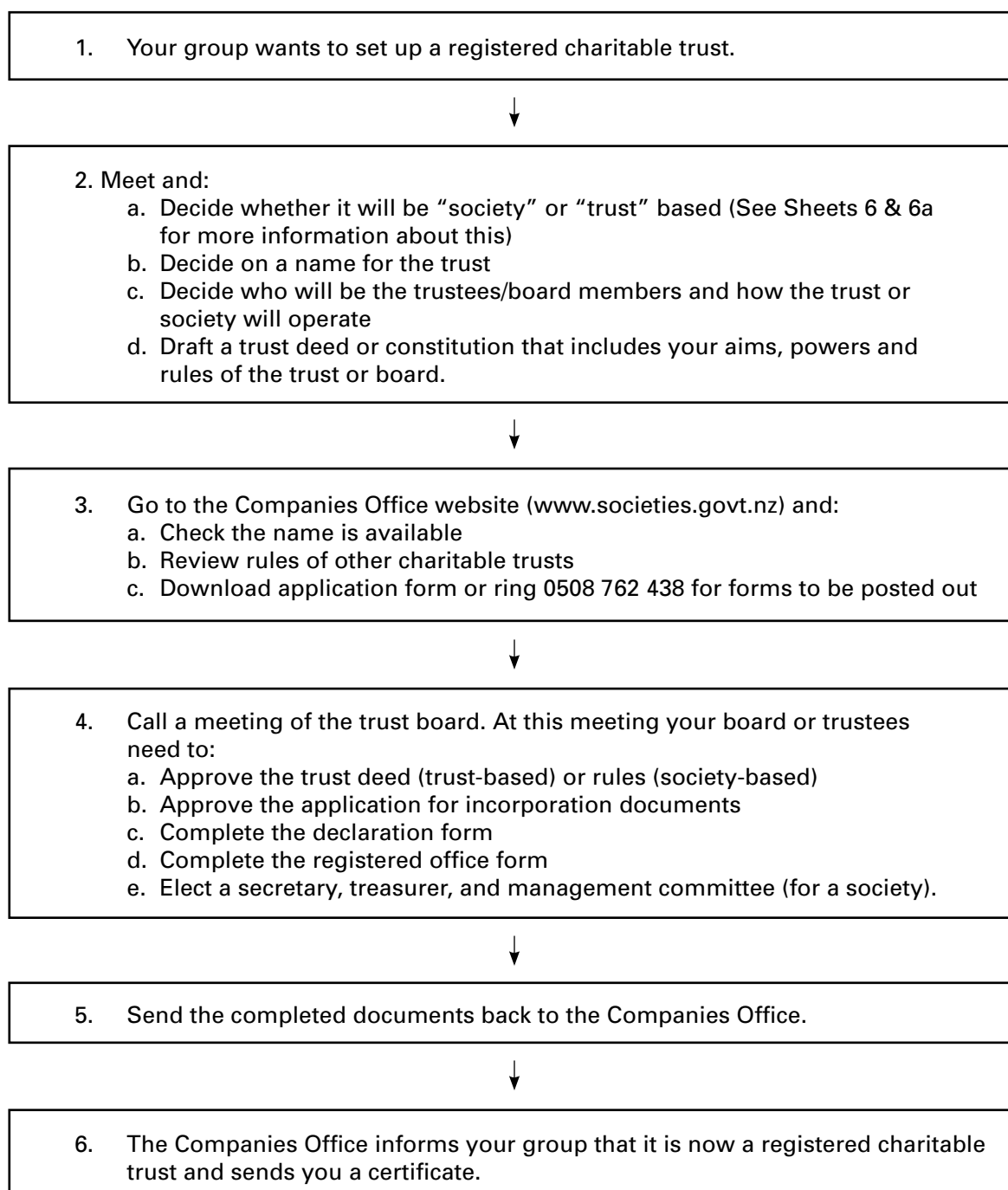


Setting up a Registered Charitable Trust

The benefits of your organisation becoming a charitable trust are outlined on information sheet 6. This sheet shows you the steps involved in setting up your charitable trust. For more information please go to www.societies.govt.nz.

The Companies Office is the government agency responsible for administering corporate body registers, including the Societies and Trusts Register, and the Companies Register.



7. To maintain your registration annually you will need to file the following documents with the Registrar of Incorporated Societies:
- a. Any rule changes (including name changes)
 - b. Any address changes.
- If you are registered with the Charities Commission, you will also need to notify changes and file an annual return (including annual accounts) with the Charities Commission.*



Charities Commission Registration

If you want to apply for registration under the Charities Act 2005, you need to make sure that you meet their requirements for registration.

These cover three items:

- a. The name needs to be suitable i.e. not offensive or liable to mislead the public
- b. The purposes need to be exclusively charitable and
- c. The officers need to be qualified under the terms of the Charities Act 2005.



Income Tax Exemption

If you wish to have income tax exemption status for your organisation, you need to either:

- Contact the IRD and enquire about how your group may be eligible,
- OR
- Consider becoming a registered charity with the Charities Commission.

For more information please see information sheet 7 (Charities Commission) or information sheet 8 (Tax Information).

(taken from the Community Resource Kit, Family & Community Services – Ministry of Social Development – Crown Copyright 2006)

Do we need a lawyer to set up our Trust?

This depends on the complexity of your group. You may find that you are able to draft your rules using templates and information on the Charities Commission and Companies Office websites. Your local Venture Southland Community Development Planner will also provide assistance.

What happens if the Companies Office declines our application?

Depending on the reason(s) for the rejection, this may be able to be rectified. It may be a matter of adjusting the wording of your group's rules or trust deed to suit the charitable criteria.

LINKS / WHERE TO GO FOR MORE INFORMATION:

www.societies.govt.nz

www.charities.govt.nz

www.ird.govt.nz

*For more information or help you can also contact your local Community Development Planner at Venture Southland:
143 Spey Street, Invercargill
Ph: 03 211 1400
enquiry@venturesouthland.co.nz
www.southlandnz.com*