



ROTARY NOTE NO. 2021/13

TOPIC: Charitable Fundraising Authority

Charitable Fundraising Authorities are issued by Fair Trading NSW and impose requirements for accounting, record keeping and retention and the qualifications of the auditor of the fundraiser's accounts.

If the funds raised by an organisation, for a charitable purpose, are not more than \$15,000 per annum a Charitable Fundraising Authority is not compulsory.

Full details can be found at [Charitable Fundraising Guidelines](#)

KEY POINT(S)

Charitable Fundraising occurs when funds are raised for a charitable purpose.

A charitable purpose exists when the funds raised are intended to provide assistance or benefit to the community or a section of the community rather than for individual benefit or reward.

In a Rotary context, monies deposited in the General Account are intended for the benefit of individuals (members of the club) and include dues, monies raised from members and guests but not from the community. Monies deposited in the Project Account are intended to provide benefits to the community or sections of the community and will include District Grants and funds raised from the community by donations or the sale of goods and services.

Fundamentally, if your organisation receives \$15,000 or more per annum for charitable purposes, it should have a Charitable Fundraising Authority.

There are no charges associated with applying for or renewing a Charitable Fundraising Authority. Once granted the authority is valid for five years.

In order to apply for an authority, you will need to provide the following documentation or information:

1. A completed application form which can be found at [Application Form](#).
2. A statement of your organisation's Goals and Objectives which are contained in your Constitution.
3. A copy of your Certificate of Incorporation.
4. Details of your auditor's qualifications and experience. The auditor should be at least a CPA or CA.
5. A copy of your most recent annual accounts and auditor's report.

When lodging your application by email, ensure that all documents are transmitted as pdf files and not as links to servers.

For more
information contact: *Ian McKensey, ian.mckensey@me.com, 0438 845 921*