



PTAEZ GRANT APPLICATION - 2017-18

For Peralta District PTA Units and Councils

The purpose of these grants is to pay for one year of the PTAEZ accounting program for any unit which qualifies. Units are encouraged to begin the 45 day free trial period before applying.

To assist units in these efforts, Peralta has established a PTAEZ Grant with:

- 20 grants of \$99 each to qualifying units.
- Applications accepted throughout the year.

Name of PTA Unit: _____ Date: _____

Name of Council (if in council): _____ or Out of Council

Name, address, phone # and email of PTA President: _____

Qualifications:

- This \$99 grant is available to those who are not currently paid subscribers to PTAEZ.
- The current treasurer must indicate via his/her signature below, that he/she is willing to learn PTAEZ and will commit to using it for the period of one year.
- The following three (3) documents are required for consideration of the application. If your PTA has not submitted them through channels to Peralta District PTA, they need to be attached.
 - ✓ Your unit’s most recent audit
 - ✓ Your unit’s annual financial report for the preceding year
 - ✓ Your unit’s budget for the current year

Please answer the following questions in the space provided:

1. Do you have a treasurer willing to learn and use (via online training) this software?

2. Will you begin to use PTAEZ immediately? If not, what date do you expect to begin using it?

3. Is your current treasurer willing to serve as a mentor to your next treasurer?

PTAs awarded a grant will be asked to sign up for the program and forward their invoice to Peralta District PTA for payment. PTAs will be asked to send in a financial report using PTAEZ within the first three months to Peralta District PTA. Send the report to the Peralta District PTA president and the Peralta District PTA treasurer. Thank you!

Signature of Unit President: _____

Signature of Unit Treasurer: _____

Applications must be received between October 1 and December 15

Email to: grants@peraltdistrictpta.org Mail to: Ujjwala Gadgil, Peralta District PTA president, 45121 Cougar Circle, Fremont CA 94539