



# PTAEZ Grant Application

**Peralta District PTA is offering 20 grants of \$99.00 each to qualifying units in Peralta District PTA.**

The purpose of these grants is to pay for one year of the PTAEZ accounting program for any unit which qualifies. To apply, please complete this form and email to grants@peraltadistrictpta.org. If you need to send a hard copy, please email grants@peraltadistrictpta.org for a mailing address. Units are encouraged to begin the 45 day free trial period before applying.

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: \_\_\_\_\_