

PURCELL BACH TRUST RULES

June 2025

The Trust was set up to secure the Bach for the future generations.

Any major issue concerning the management of the Bach by the PURCELL BACH TRUST must be addressed through correct legal processes.

The Manager will be appointed by the Trustees for a period of a year. The appointment will be confirmed at the Annual Trustee meeting. The appointment can be renewed at the trustees discretion. The Manager can be removed by the trustees at any time.

The Manager will be required to

1. Request from Family Members payment of the Levy each year
2. Collect and manage the Bach levies.
 - a. Be the signatory to the Bach Trust Accounts
 - b. Ensure payment of all costs associated with the Bach's annual costs from the Levy and Rental Income
 - c. Organise and pay for the maintenance of the bach from the Levy and Rental Income to ensure it is safe and maintained
 - d. Organise and pay for any capital upgrades of the Bach from the Levy and Rental Income and source other funds if needed once confirmed by Trustees
 - e. The Manager is not to use the Account for any other purpose than Bach matters
 - f. The Manager is to allow the Trustees full access to any financial document or account details for the Bach at any time.
 - g. Set a budget each year
 - h. Prepare End of Year Annual Accounts for year end March 31. These are to be shared with trustees by April each year.
 - i. Prepare and submit the Tax requirements
3. Organise a fair and equitable timetable for the Family Member payees and renters. Family members, who have paid the Levy, will have priority.
4. Prepare a report for Trustees for annual April meeting including
 - a. Report on Bach Occupancy
 - b. Report on Bach Maintenance
 - c. Annual Finance Accounts
 - d. Report on future issues / concerns
5. Advise the Trustees about any complaint from Family Members so they are resolved or addressed through a mediation process

6. Ensure the Bach complies with all requests from the NPDC or other legal entities
7. Ensure the Trust document is central to the management of the Bach

Annual and General Costs:

1. That general household items are paid for by individual visitors (eg.replacement toilet paper) as they come due with no reimbursement.
2. That the annual fixed costs such as: rates, lease, utilities and insurances are paid by the Trust Account.
3. That maintenance and repairs be paid by the Bach Trust Account (e.g lawns, spraying, painting).
4. That capital projects or items over \$200 are paid equally by each Family Members (eg. Renovation of shower area, new BBQ)

Potential Annual Costs

AREAS	Pre 2024	2025
Rates	\$1 200	1 600
Lease	\$2 520	2 900
Insurance	\$1 600	2 600
Utilities: • Trustpower • The Lines	\$1 600	1 800
Maintenance (per annum)	\$1 000	1 000
Capital		500
TOTAL	\$7920	10 400

This does not include large Capital Development costs. These will be decided annually by the trustees.

The Bach Levy is a charge to all Family Members over the age of 21 and is to be paid into the Bach Account for the maintenance and development of the Bach. The Bach Levy is set by the Trustees each year. The Bach Levy is to be \$850

The payment of the Bach Levy will provide the following. **This option is only open to Family Members who have paid the Levy**

1. Free access to the Bach within the lease rules
2. No nightly charge for Family members using the bach – not friends of family
3. Rotation of Bach Use: see below
4. Priority over public bookings for family members
5. Receive a pro rata share of the 240 days that the Bach is able to be used in a year at no daily cost. The Bach is only allowed to be used for 8 months of the year (or 240 days)

Non Payment of Bach Levy

6. If a family member does not wish to pay the Levy they can use the Bach by paying as a Bach Visitor and access to the Bach will be as a Bach Visitor.
7. If a family member wishes to rejoin as an annual contributor after a period of non-payment of the Levy, then the trustees will determine an appropriate amount to cover maintenance and development of the Bach over the years of non-payment. This amount will recognise the annual cost of maintaining the Bach. The total amount of each year not paid will not be higher than the usual yearly Levy unpaid by the family member.
8. If a Family member does not pay the Levy due every year and the Bach is sold then an appropriate amount determined by the Trustees will be deducted from any portion of the sale going to those members.

Bookings

Bach Visitors are those who wish to hire the Bach and are not Family Members or are Family Members not paying the annual levy.

Bookings are to be made via the Manager.

Bach Visitors will be charged \$80 per night for 4 persons and an extra \$10 for additional persons

The following dates are blocked off and rotated through families:

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|----------|------------------------------|
| Easter | - Thursday to Tuesday |
| Xmas | - December 23 to December 28 |
| New Year | - December 29 to January 3 |
| Summer | - January 4 to January 10 |
| Waitangi | - 3 day weekend |

	Waitangi	Easter	Xmas	New Year	Summer
	Feb 6	Thursday to Tuesday	Dec 23 to Dec 28	Dec 29 to Jan 3	Jan 4 to Jan 10
2026	Julie	Greg	Margot	George	Sylvia
2027	Thomas	Declan	Guy	Oliver	William
2028	Sylvia	Julie	Greg	Margot	George
2029	William	Thomas	Declan	Guy	Oliver
2030	George	Sylvia	Julie	Greg	Margot
2031	Oliver	William	Thomas	Declan	Guy
2032	Margot	George	Sylvia	Julie	Greg
2033	Guy	Oliver	William	Thomas	Declan

2034	Greg	Margot	George	Sylvia	Julie
2035	Declan	Guy	Oliver	William	Thomas

If the person listed is not using the Bach at the time please let the Manager know as early as possible. It will then be available to other family.

The bach can only be booked six months before the date to be booked

A central booking website will be established and shared with all families.

Capital Projects

At certain times the trustees may decide on capital projects to improve the bach (e.g. roof replacement, water tank replacement, new sheds etc.) These costs will be evenly split across the family members . If a family member does not pay their share then these unpaid amounts will be deducted from their share if the Bach is sold.

Subletting of Bach

The Bach can be sublet to support the maintenance and development of the Bach.

Family members need to be aware the rental income is important to the continued success of the Bach and rental bookings once confirmed will not be altered unless under dire need.

Family members who do not agree with the subletting of the bach must make this known to the Trustees.