

# EXPORT MARKET DEVELOPMENT GRANTS

## GUIDE TO RECORD KEEPING

This publication provides applicants with details of the information they may be required to provide Austrade to substantiate the expenses they claim.

**(Please note that all documents must be in the .pdf format)**

Expense category	Example of details required	Examples of supporting documents
Schedule 1A: Overseas Representation	<ul style="list-style-type: none"> <li>Up-to-date representative's details (including phone, fax, email address and mobile)</li> <li>Details of activities carried out</li> </ul>	<ul style="list-style-type: none"> <li>Agreement or Letter of Appointment, showing the relationship, role, duties, function and reporting requirements of the Representative.</li> <li>Evidence of activities carried out (eg correspondence, email, reports).</li> <li>Details of remuneration of the representative (eg telegraphic transfers, bank transfer)</li> </ul>
Schedule 1B: Marketing Consultants	<ul style="list-style-type: none"> <li>Up-to-date consultant's details (including phone, fax, email and mobile)</li> <li>Nature of project or consultancy assignment</li> <li>Relevant country</li> </ul>	<ul style="list-style-type: none"> <li>Agreement or Letter of Appointment, showing the relationship, role, duties, function and reporting requirements of the consultant.</li> <li>Evidence of activities carried out (eg correspondence, email, reports)</li> <li>Details of remuneration of the consultant (eg telegraphic transfers, bank transfer).</li> </ul>
Schedule 2: Marketing Visits	<ul style="list-style-type: none"> <li>Name of person</li> <li>Purpose of travel</li> <li>Departure and arrival dates</li> <li>Number of days of marketing activities.</li> </ul>	<ul style="list-style-type: none"> <li>Travel agent's invoices/tickets</li> <li>Expense reports</li> <li>Travel diary/visit report for each trip</li> <li>Boarding passes/passport extracts</li> <li>Bank statement evidencing payment.</li> </ul>

Schedule 4: Free samples	<ul style="list-style-type: none"> <li>Type of sample</li> <li>Recipient of the sample</li> <li>Country of recipient of the sample.</li> </ul>	<ul style="list-style-type: none"> <li>No-charge invoice/correspondence</li> <li>Costing records</li> <li>Freight documents</li> <li>Bank statement evidencing payment.</li> </ul>
Schedule 5: Trade fairs and promotional events	<ul style="list-style-type: none"> <li>Type of activity</li> <li>Relevant country</li> <li>Supplier details.</li> </ul>	<ul style="list-style-type: none"> <li>Details of trade fair/seminar etc.</li> <li>Invoices</li> <li>Bank statement evidencing payment.</li> </ul>
Schedule 6: Promotional literature and advertising	<ul style="list-style-type: none"> <li>Type of activity</li> <li>Relevant country</li> <li>Supplier details</li> </ul>	<ul style="list-style-type: none"> <li>Examples of brochures, advertisements, websites etc.</li> <li>Evidence of use in overseas market/s</li> <li>Invoices</li> <li>Bank statement evidencing payment.</li> </ul>
Schedule 7: Overseas buyers	<ul style="list-style-type: none"> <li>Buyer's name and organisation</li> <li>Purpose of visit to Australia.</li> </ul>	<ul style="list-style-type: none"> <li>Evidence of the relationship between the buyer and the applicant</li> <li>Evidence of activities carried out during Australian visit</li> <li>Invoices</li> <li>Bank statement evidencing payment</li> </ul>
Schedule 8: IP registration and related insurance	<ul style="list-style-type: none"> <li>Description of the IP expenses (patent registration)</li> <li>Relevant country</li> <li>Supplier details</li> </ul>	<ul style="list-style-type: none"> <li>Ownership or assignment details</li> <li>Supplier invoices</li> <li>Bank statement evidencing payments</li> <li>Evidence of promotion of the IP.</li> </ul>
Schedule 9: registration and related insurance for IP	<ul style="list-style-type: none"> <li>Description of the IP, patent insurance expenses</li> <li>Relevant country</li> <li>Supplier details</li> </ul>	<ul style="list-style-type: none"> <li>Ownership or assignment details</li> <li>Supplier invoices</li> <li>Certificate of insurance</li> <li>Bank statement evidencing payments</li> <li>Evidence of promotion of the IP</li> </ul>