

Personalised Philanthropic Advice

Helping you on your giving journey.

Philanthropy is incredibly personal, and each person's motivations for giving are diverse. There is no one-size fits all solution for giving and this is why we offer a number of personalised philanthropy advice packages to provide you with support and guidance.

When you're running a business and making money, there's an entire infrastructure around you – assistants, associates, accountants and more – to help facilitate your success. But when it comes to giving money away, the equivalent infrastructure isn't so readily accessible.

Whether you are an individual, family, or organisation looking to share your good fortune, starting on the giving journey can often be a lonely and difficult learning process. We believe getting quality advice is crucial to help strengthen your giving and provide a short-cut to your learning. Helping you make the biggest impact from the very start; because we know – when it's done well – giving can create a real positive change.

Our clients often comment on how much they value our philanthropic advice, but not all of them thought it was what they needed when they first started out.

Even if you are already engaged in philanthropy, there can be considerable value in taking a fresh, objective look at your strategy. By reviewing your activities, projects and grants, you can make sure your giving is closely aligned with your vision.

"The resources and prompts you gave me in our advice session were invaluable for challenging my thinking and refining my approach to giving. They were a great way to kick-start a conversation with our son about his philanthropic interests as well" - Gift Trust Donor

PHILANTHROPIC ADVICE PACKAGES

Navigating Giving

A starter package for those who are looking to formalise their giving.

It aims to help tease out your motivations for giving, to identify the causes closest to your heart and to craft a clear statement around your giving vision and goals.

We'll explore:

- Your experience of philanthropy.
- What you want your wealth to achieve and for whom.
- Your hopes for your family and your community.
- The issues and organisations that matter to you.
- How you want to involve your family in your giving.
- How involved you want to be with the organisations you gift to.
- Establishing clear personal charitable objectives.

What the package includes:

- **A one-on-one meeting between you and our Philanthropic Adviser.**
A one-on-one meeting between you and our Philanthropic Adviser.
- **Crafting a giving intent statement**
to help you proactively seek organisations to support that fit your giving strategy.
- **Guidance, support and direction**
for the next steps in your giving journey
- Up to **6 hours** of support

Costs: \$990 Where travel is required additional travel fees may apply

FIND YOUR MATCH

Expert knowledge to help you identify and research relevant causes.

Once we understand the personal reasons for your giving, we can provide hands-on assistance and guidance on the best way to support your areas of interest and provide sector-specific knowledge and contacts. All of these can profoundly impact the effectiveness of your philanthropy.

We'll help to:

- Research areas, or charities, of interest.
- Provide support on grant making policies.
- Vet potential grant recipients (for all our Gift Account holders we conduct standard due diligence on donations, but we can provide more in-depth research including meetings with the charities).
- Make introductions to like-minded philanthropists.
- Educate and prepare the next generation for future responsibilities.

Costs: \$150/hour

Talk to us on (04) 391 4438 or email info@thegifttrust.org.nz
www.thegifttrust.org.nz

