



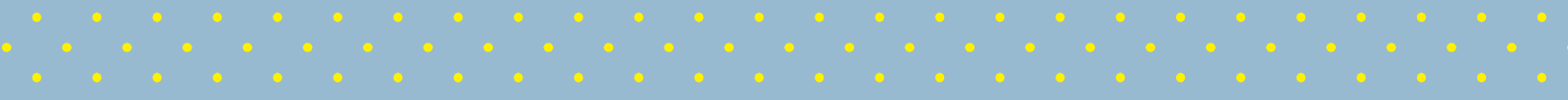
You can **make good happen** with The Gift Trust

FOR ADVISORS

About **The Gift Trust**

The Gift Trust's purpose is to simplify generosity, to make good happen. If your client is interested in charitable giving and doesn't know where to start or how to structure their giving, we offer a solution. We connect your clients with charitable organisations making a difference, through personalised giving plans. We help donors to give with confidence and deeper effect. It's just like having a private foundation, but without the admin hassle or costs.

Let The Gift Trust be your expert partners in giving, helping you build deeper and more enriching client relationships. Together, we'll make good happen.

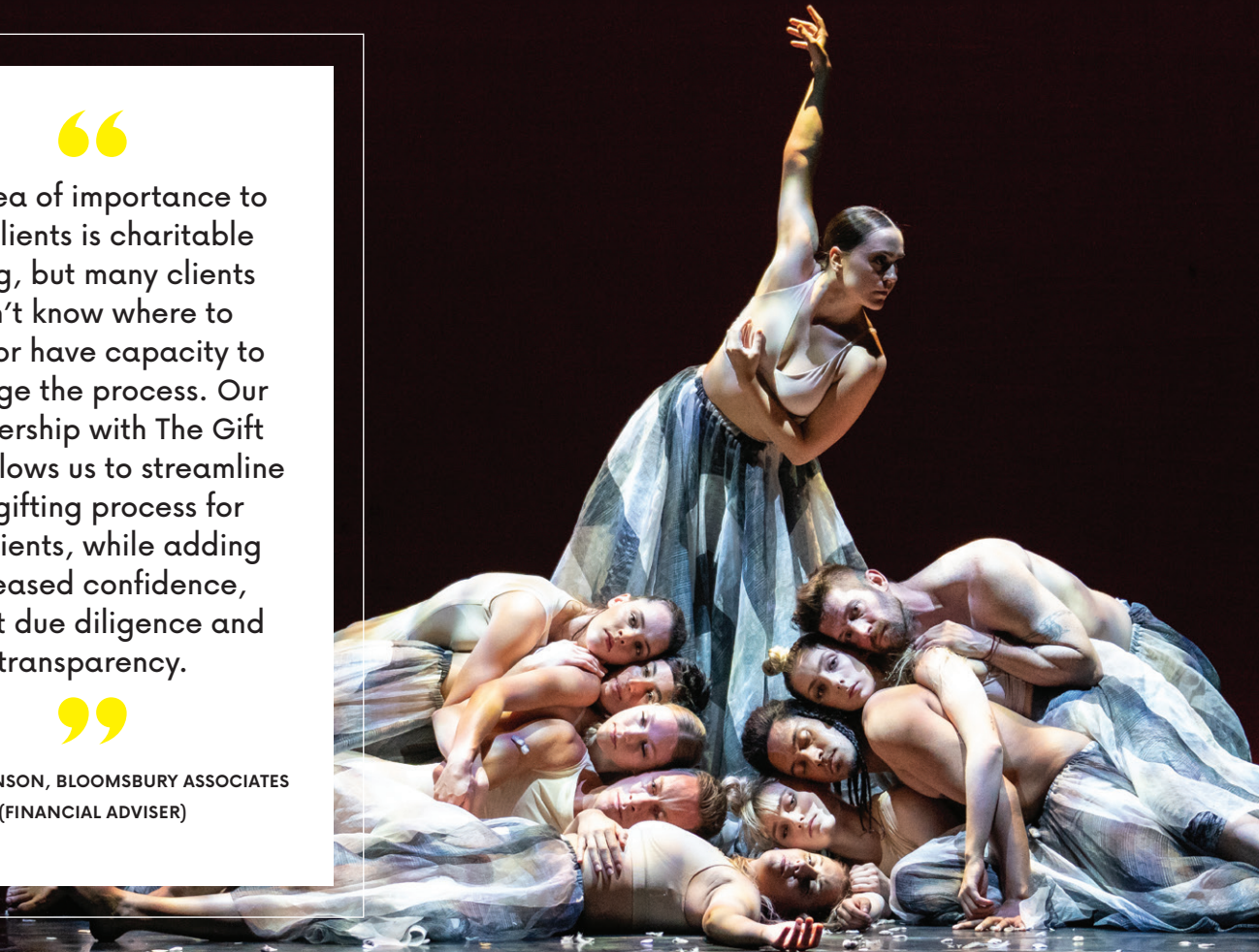


“

An area of importance to our clients is charitable giving, but many clients don't know where to start or have capacity to manage the process. Our partnership with The Gift Trust allows us to streamline the gifting process for our clients, while adding increased confidence, robust due diligence and transparency.

”

PHIL STEVENSON, BLOOMSBURY ASSOCIATES
(FINANCIAL ADVISER)



How it works

A decorative graphic consisting of several yellow circles of varying sizes arranged in a pattern that suggests growth or a funnel. A thick black curved line starts from the left and curves upwards towards the right, ending under the largest cluster of yellow circles.

1. Gift

You can refer a client to set up a Gift Account simply and easily today. Accounts start with a minimum \$5,000 donation (or \$20,000 for accounts where the funds are managed by a financial adviser). Donations are eligible for tax credits, and Gift Accounts can be named by your client. There is no need for clients to specify upfront what causes they want to donate to, so they can support a variety over time.

2. Grow

For accounts with more than \$20,000, your client's donations can be invested in a variety of ways to grow, tax-free. If you are a financial adviser, you can continue to provide this investment advice for your client's new Gift Account. Or clients can choose to have funds managed in The Gift Trust's pooled responsible investment portfolios.

3. Grant

Your client can decide when and which charitable causes to donate to, in New Zealand or internationally. The Gift Trust checks their credentials and can provide research or guidance on your client's giving.

“

The real value of The Gift Trust is that if you're interested in charitable giving, but you don't know where to start, we provide specialist advice, knowledge and do due diligence. There's an independent expert team doing that work for you.

ANNETTE CULPAN, TRUSTEE

”

The Gift Trust's Board of Trustees are Phil McKinstry, Annette Culpan, Anake Goodall, Alanna Irving and David Woods. The Board support a team of expert staff, including Executive Director Cheryl Spain, to **make good happen.**



IMAGE: THE LEARNING ENVIRONMENT

BENEFITS



Enrich client relationships

Build loyalty with your clients by discussing charitable giving and helping them discover a new purpose in life.



Expert advice

We connect your client to aligned charitable causes. We provide expert advice on local or global charitable organisations through a personalised giving plan.



Free up valuable resources

We take care of all the mechanics and due diligence so you can focus on your specialised advice.



Clients get tax credits now, but donate whenever

Donors receive all the tax benefits upfront, while they take their time to choose where to give.



Grow your clients' charitable funds tax-free

Donors funds can grow tax-free in a variety of investment options, allowing them to give more to charity over time. We can work with the clients' preferred financial advisers.



For good, not for profit

As a lean non-profit, our fees are low and only cover our costs. Refer to our fees schedule depending on your client's needs.

IMPACT

“

The administration and ongoing compliance requirements involved in setting up a private charity can be onerous, and even risky. Setting up a Gift Account allows The Gift Trust to look after those requirements, and provide support that allows the donor to focus on what they really want to do with their gifts.

”

SUE BARKER, LAWYER AND CHARITY SPECIALIST



IMAGE: MANAIKALANI EDUCATION TRUST



Your expert partners in giving. Helping you build more enriching client relationships.

Together, we'll **make good happen**



(04) 391 4438 | info@thegifttrust.org.nz | thegifttrust.org.nz

The Gift Trust is a New Zealand registered charity: CC40774