



ANNUAL REPORT 2019



WELCOME

This year The Gift Trust has had another exciting year of growth. We've helped our donors spread their incredible generosity to a vast variety of causes and we've given away more donations than ever before. We've welcomed on board many new donors, including families, individuals and companies. We're proud to have launched some new services, including offering our donors the option to invest their charitable funding in responsible investment portfolios, aligning their investments with their values.

We've also welcomed two talented new members onto our Board - Alanna Irving who has a strong background in tech, social enterprises and charities, and Annette Culpan, an experienced philanthropy trustee and adviser. Both will bring their wealth of expertise to our team.

We've been involved in some interesting collaborations this year, including being part of a group of philanthropic trusts who gave funding to get more input from charities into the Charities Act review process. You can read more about that on page 2.

The Gift Trust is continuing to thrive. Something we are most proud of is being able to offer our donors quick answers with flexibility and ease. We don't think giving money should be difficult and we make it as easy as possible, while providing the important research and checks and balances on the charitable causes that give our donors reassurance. We're looking forward to another year helping donors make the world a better place, one donation at a time.

Glen Saunders (Chair)
Cheryl Spain (Executive Director)



On behalf of the trustees: Alanna Irving, Anake Goodall, Annette Culpan, David Woods and Philip McKinstry.

HIGHLIGHTS



Map Action

Spreading generosity to every sector

Every year we are delighted by the breadth of the charitable causes that our donors choose to support. The causes are as diverse as our donors, but they all have one thing in common – they want to make a positive change in the world. We have donated to international, national and local causes.

This year our donors have supported a range of charitable causes including emergency mapping and information management after international humanitarian disasters (\$49,000 to Map Action). We've given funding to provide food to those in need in Wellington and reduce food waste from supermarkets and retailers (\$25,000 to Kaibosh). We've donated to help preserve New Zealand's heritage food plants, vegetable seeds and fruit trees (\$15,000 to Koanga Institute). We've helped provide assistance dogs for people with disabilities (\$20,000 to Assistance Dogs NZ) and for a research project investigating what ambition means to Kiwis (\$10,000 to Project Ambition).

These are just a few of the many and varied causes we've helped our donors to support. For the full list see page four.



Planting day in Wainuiomata

Vital voices in the review of the Charities Act

The Gift Trust was proud to be one of 12 philanthropic funders for a research project to gather feedback from New Zealand charities to inform the government review of the Charities Act.

The government is undertaking a vital ‘once in a lifetime’ review of the Charities Act, which is the legal mechanism that regulates charities. We wanted to ensure that charities have their say on this important review so that they can suggest changes that are needed to the charities sector.

The research project was led by lawyer Sue Barker and charity advocate Dave Henderson. It gathered feedback from charities across New Zealand.

The Gift Trust donated funding to the project and coordinated other funders contributions. The results of the review will be made public later in 2019.

A double boost for Wainuiomata River restoration

Some Gift Trust donors like to use their donations to encourage others to give to the causes they care about too. The Velvin family made a generous donation through The Gift Trust to support a Million Metres project to restore Wainuiomata River in the Wellington region. They matched all donations that others gave to the project, up to \$15,000. This provided double the funding, and enough to cover 350 metres of river restoration.

The project involved volunteers from Friends of Baring Head and Conservation Volunteers replanting 1,500 native plants and trees along the Wainuiomata River. Historic deforestation and grazing have resulted in erosion and loss of river edge habitat, affecting fish spawning sites and mussel habitat. Replanting the Wainuiomata with native plants and trees will reduce erosion, speed recovery of the area, increase plant diversity and repair inanga (whitebait) spawning sites.

The Velvin’s live in the greater Wellington region and believe strongly in the importance of improving water quality and conservation.

OVERVIEW

2018-2019 Financial Year

\$5.65 million
total donor funds
under management

\$373,366
donations made
to charities

+201%
more donations
made than in
previous year

\$742,240
new donor funds
received

120
donations made

\$61,250
largest donation

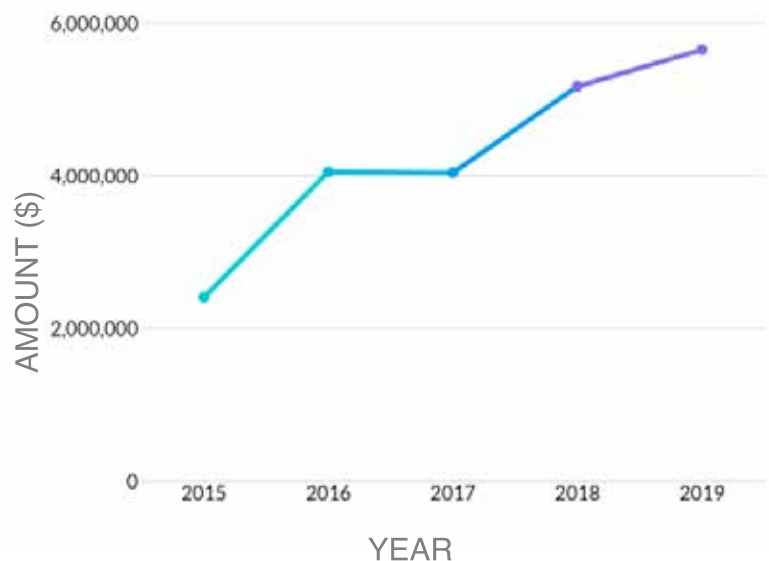
\$1,216,925
All donations made
to date

New responsible investment options on offer

This year we are excited to have released a new responsible investment option for Gift Accounts over \$20,000.

We now have a variety of investing options, including giving donors the choice of two responsible investment portfolios. These take account of a range of social and environmental factors, and exclude a variety of investment including fossil fuel stocks. They are expected to offer good investment returns over the long term.

Total donor funds



Our audited financial accounts can be found at www.thegifttrust.org.nz/about-us

Donors' grants to date



- Arts, Music & Culture (\$205,694)
- Education (\$241,850)
- Community (\$272,892)
- Health + Social Services (\$211,732)
- Environment (\$162,686)
- Youth (\$50,852)
- Religion (\$20,337)
- International development (\$50,904)

Philanthropic advice service launched

This year we launched a number of personalised philanthropic advice packages to provide support and guidance for people beginning on their giving journey, or those looking to make refinements in how they give.

Quality advice strengthens giving and helps donors make the biggest impact from the very start; because we know – when it's done well – giving can create real change.

Contact us if you'd like to know more about the philanthropic advice packages we can provide.

Donation recipients

ActionStation • Asia Harvest Trust • Assistance Dogs NZ Trust
Auckland City Mission • Barefoot College India • Be Accessible
Bishops Action Foundation • Blind Foundation • BSF
BWB Publishing Trust-Capital for Life • Child Cancer Foundation
Christchurch City Mission • Downtown Community Ministry • Ekos
Enspiral • Environment and Conservation Organisations NZ
Fred Hollows Foundation • Gautama Buddha Free School
Generation Zero • Hillary Institute • House of Science NZ
Hui E Community Aotearoa • Jane Goodall Institute • Kaibosh
Khyentse Foundation • Kidscan • Koanga Institute • Lifewise
Map Action • Market Forces • Mary Potter Hospice
Million Metres Streams Project • Miracle Feet
Motueka Rudolf Steiner School • Native Bird Rescue NZ
Alternative • OMF • One Per-cent Collective
Otakaro Orchard • Project Ambition • Red Cross NZ
Rigdzin Bum Tsog Trust • Rites of Passage
Salvation Army • Scoop Publishing Limited
Seed the Change | He Kākano Hāpai • Service Space
St. Johns • Starship Foundation • The Aunties • UNICEF NZ
Vipassana Trust • Waiheke Community Housing Trust
Waiheke Pool society • Wangapeka Study and Retreat Centre
Wellington City Mission • Wellington Hospital Chaplaincy
Wellington Shambhala Centre • Women's Refuge • World Vision



HIGHLIGHTS CONTINUED



Dr Jane Goodall during her NZ tour



Assistance Dogs

Making business and charity giving easy

Gift Accounts are not just for individuals and families looking to simplify their giving, businesses and charities can also benefit from opening a Gift Trust account.

Recently we've had new accounts opened by high profile charities the Jane Goodall Institute NZ and the Edmund Hillary Fellowship, both of whom are looking to build up an endowment with their Gift Account.

Both charities can receive funds through their Gift Trust account, and they are promoting this to their donors who may prefer to give through a donor-advised fund (like donors based outside of NZ, for whom it can be an easier option).

Likewise, we are also supporting businesses to channel their business giving. The financial adviser company Bloomsbury Associates are using their Gift Account to pool their own donations to charity alongside those of their clients, so they can make an even bigger impact on charities. If your business or charity would like to find out more, speak to us.

Milestone: you're one in a million

Last year we hit a milestone – we've helped our amazing donors spread over \$1 million to good causes ranging from environmental projects to human rights, education projects to health care, poverty to the arts, and everything in between. We're so proud to have played a part in this.

Over 2018 we shared a variety of videos of thanks from many of the wonderful charitable causes we've supported.

We look forward to supporting our donors with the next million, and more!

ABOUT THE GIFT TRUST



Our mission is to help people donate to the charitable causes they care about more easily and effectively.

We all want something in the world to change. Maybe you've been fortunate in life, have more than you need and feel you could give back to those less fortunate. The Gift Trust makes it easy for you to give to the causes you care about and create a proactive, strategic approach to your giving.

We help you rethink when, why and how you give.

Perhaps there's a cause or an organisation that's special to you. Perhaps giving is a family tradition, or you want to start a family tradition. Whatever the reason, you want a trusted partner who understands you and your goals. The Gift Trust can help connect your good fortune to people and organisations with world changing ideas, but limited resources.

What if you could support all your favourite charities with just one donation? That's the power of a gift account. A place where you can give, grant and grow your giving. Make your giving experience easy, effective and joyful with The Gift Trust.

A modern alternative to a private foundation.

Get in touch to learn more about
our Gift Accounts:



+64 4 391 4438



Po Box 19-120,
Marion Square,
Wellington 6141



info@thegifttrust.org.nz



www.thegifttrust.org.nz