

Make good happen



Welcome

The past year has been an exciting one for The Gift Trust. We helped our donors spread more generosity than ever before, at a time when it was most needed. We're on a mission to help donors support more good causes by easing the administrative burden and connecting donors to causes who are making a difference through tailored research. Last year we helped our clients support more good work than ever before by giving \$1.6 million in donations to charitable causes – tripling our donations from the previous year. This was at a time when many charities were struggling from a drop in donations due to the impacts of Covid-19 and so this increase was especially important.

We welcomed many new donors this year, including businesses who want to give back to their communities. We received over \$3 million into Gift Accounts and these donations will be given to a variety of good causes in the future. We conducted more research and tailored advice for clients, providing them with information and connections to help them choose who to support. You can read more about the advice we provide on page 5.

We launched an innovative new initiative, Gift Collective, that helps newly forming charitable entities to get up and running quickly and receive funding in a tax effective manner. Read more about it on page 3.

This year marked the end of an era at The Gift Trust and the start of a new phase as we farewelled our founding Chair Glen Saunders in June 2021 and welcomed Phil McKinstry as our new Chair.

Glen founded The Gift Trust with much energy and endeavour in 2009. With the Trust now well established and filling a real need in communities across New Zealand, he decided that after 12 years it was time to move on to new adventures. You can read more about the transition on page 4.

Together, we're making good happen.

**Cheryl Spain (Executive Director)
and Phil McKinstry (Chairman)**

on behalf of The Gift Trust trustees –
Phil McKinstry, Anake Goodall, Annette Culpan,
Alanna Irving, David Woods



“
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”



IMAGE: THE LEARNING ENVIRONMENT

Growing support for the environment

This year The Gift Trust facilitated many donations to environmental causes. We have attracted donors who are interested in this sector and have provided advice with our expertise in environmental giving.

In the last financial year over 35% of The Gift Trust's donations went to environmental and conservation causes, compared with around 4% of donations going to environmental causes overall in New Zealand. The causes were broad and varied and you can see a full list of those we donated to on page 7.

One of the environmental causes our donors supported is the Learning Environment, a Whanganui based project to regenerate Piwakawaka Farm as part of a "living campus" offering practical environmental courses for students. One of our Gift Account holders, the Namaste Fund, gave a donation of \$250,000 to the Learning Environment, and we also facilitated over \$200,000 of donations to them from American based donors through our account in the USA. This facilitation demonstrates our ability to work internationally and overcome administrative hurdles and associated costs.

Another Gift Account, the Carbon Critical Net Zero Fund, supports a range of charities working on climate change solutions. Some of the organisations they support include Te Ara Whatu, Generation Zero, 350 Aotearoa and the USA based organisations Clean Air Task Force, Climate Emergency Fund and Coalition for Rainforest Nations.

If you'd like some research or introductions to organisations working in the environmental field please speak to us.



IMAGE: MANAIKALANI EDUCATION TRUST

Helping businesses with their gifting strategy

More businesses want to support community groups and charitable projects as part of their corporate social responsibility.

The Gift Trust provides a simple solution, allowing companies to set up their giving mechanism without having to manage their own corporate trust. We also offer support to help companies plan their giving strategy and can provide independent research on potential charitable causes that meet a company's brief.

This year we continued to run a number of Gift Accounts for a diverse group of companies, including Restaurant Brands and Rocket Lab. We helped these companies distribute donations, including scholarships for students, to a wide range of causes. This year we also ran staff workshops for new corporate clients to help them plan their giving strategy. It's important for companies to involve their teams when planning a gifting strategy and our workshops provide the space to do this. We use the staff feedback to create a giving mission statement for each company and then provide research and introductions to charitable causes that meet their goals. We look forward to announcing our new corporate clients soon when they are ready to launch their giving plans.

If you'd like to speak to us about our Business Giving packages please get in touch.

Charity fund-holding made easy

This year The Gift Trust launched a new charity fund-holding service, Gift Collective, in partnership with Open Collective NZ. Gift Collective helps charitable initiatives get up and running quickly—ready to receive philanthropic donations, grants, provide donation tax receipts, and disburse funds for expenses—without getting bogged down in paperwork and costs to set up as a registered charity. Groups get the benefits of operating through a registered charitable trust under The Gift Trust umbrella, without having to create one of their own.

Happen Films are one example of a group using the Gift Collective platform. They create documentaries that explore how we can build resilient communities and landscapes in the face of global challenges. They've said:

"Through the Gift Collective we have been able to set up a simple and easy way to attract funding for our solutions-focused documentaries. We could set this up quickly to complement our other work and allow us to drive impact in our communities."

Gift Collective is also a solution for funders who want to fund unincorporated groups through our expert vetting process, automatic reporting, and transparent budget tracking. If you know of an entity doing good work that is charitable but lacks formal legal status, get in touch. We'd love to help them to make more impact. To find out more see www.opencollective.nz/giftcollective



THE GIFT TRUST TEAM AND TRUSTEES: Back row L to R- Alanna Irving, Anake Goodall, Annette Culpan. Front row L to R- Glen Saunders, Tessa Vincent, Cheryl Spain, Phil McKinstry. Note our Trustee David Woods was absent.
IMAGE CREDIT: ANDY SPAIN

Farewelling The Gift Trust's founding Chair

It's the end of an era at The Gift Trust and the start of a new phase as we farewelled our founding Chair Glen Saunders in June 2021 and welcomed Phil McKinstry as our new Chair.

Glen founded The Gift Trust in 2009 along with our first group of trustees, with the vision of providing a service to donors in New Zealand who needed support with their giving strategy. The idea came from the international model of 'donor-advised-funds' which didn't exist in NZ at

the time. Glen took this vision and turned it into reality.

Thank you Glen for your stewardship and vision in setting up The Gift Trust and guiding us to where we are today. We wish you well on your next journey!

Phil McKinstry has been a long-standing Trustee of The Gift Trust and so brings a breadth of experience and background to his new role as Chair. Phil has experience as a senior banker and executive manager bringing more than 20 years of corporate, business, rural banking and social finance expertise to the board.



How to choose **good causes** to support

The Gift Trust specialises in providing tailored advice and research for our donors into causes that they are interested in supporting.

Many of our clients know the sectors they are interested in supporting but they don't know all the charitable organisations working in these sectors. The Gift Trust can help by providing totally independent research and introductions. We are not aligned to any charities and so can independently check their credentials and find out what work they are doing. This saves our donors time and increases their knowledge to make better funding decisions.

For example, during the past year we researched on behalf of our donors into charities working in the fields of mental health, river protection, education for children living in poverty, climate change, health and many other causes.

We can provide a range of support including a philanthropic planning session for you, your family or company. This session helps donors to identify their giving values and the areas where they want to make a difference in the world. We can help you to create a plan for your giving and then can use that to identify potential causes. You still make the decisions, but we provide information to help make the decisions more informed. Get in touch if you'd like some advice.

International donations

The Gift Trust is able to facilitate international donations in both directions easily and efficiently.

We can receive donations from donors based internationally on behalf of any NZ charitable cause. This saves the NZ charity the time and hassle of dealing with complicated international donation set-ups and tax implications. In the United States (U.S.) we have a partnership with RSF Social Finance that allows U.S. donors to make tax deductible donations to The Gift Trust's fund and to tag this for any NZ charitable cause. Normally U.S. donors would not be able to make tax deductible gifts to international charities but this fund allows them to do so.

We can also donate NZ donor's funds to international charities, within some limits. We can only spend up to a total of 25% of our total donations in one year on international causes, so if you are interested in doing this please speak to us first. Many Gift Trust donors support a wide range of international causes and you can see the full list on page 7.



Financial overview of the financial year to 31 March 2021

\$8.03m

Total donor funds under management

\$1.6m

Donations to charities this year

\$3m

New donor funds received this year

\$250k

Largest donation to charity this year

\$10,622

Average donation size

2.98x

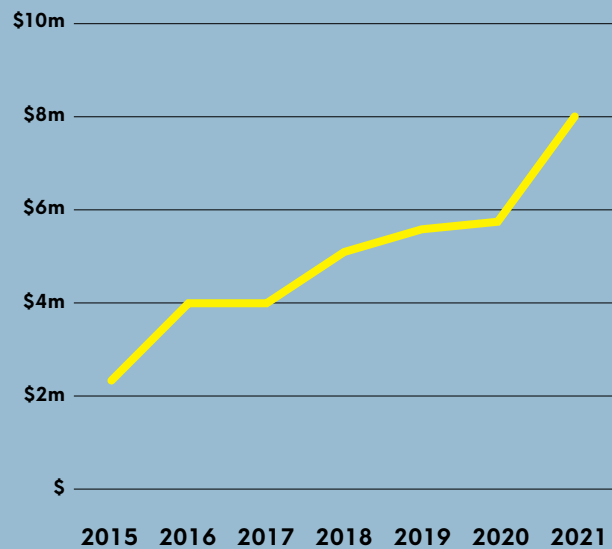
More donations than in previous year

\$3.36m

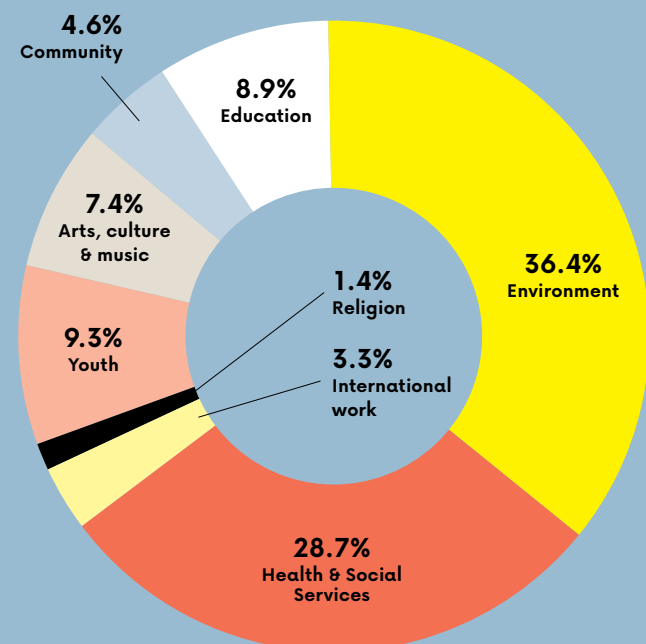
All donations made to date

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

Total donor funds under management



Donations to charities by sector for the year ending 31 March 2021



Donation recipients

1 April 2020 to 31 March 2021

ActionStation	Kidscan	Seed the Change He Kākano Hāpai
Arohanui Strings	Kiwi Community Assistance	Shakti Community Council
Asia Harvest Trust	Koanga Institute	Shields Up
Assistance Dogs NZ Trust	Learning Environment (Woven Rivers Charitable Trust)	Shift Foundation
Auckland City Mission	Manaiakalani Education Trust	SpaceBase Limited
Auckland Women's Centre	Mary Potter Hospice	Student Volunteer Army Foundation
Big Buddy	Masks4AllMalawi	Tasman Bay Guardians
Birthright NZ	Men's Health Trust NZ - Goodfellas	Te Ara Korowai
Brain Injured Children Trust	Million Metres Streams Project (Sustainable Business Network)	Te Ara Whatu
Christchurch City Mission	Mindful Money (Sustainable Initiatives Aotearoa)	Te Toki Voyaging Trust
Circa Theatre	Miracle Feet	TEAR Fund NZ
Clean Air Task Force	Motu Economic and Public Policy Research Trust	Tewaiwaka
Climate Emergency Fund	Multicultural NZ	Trees That Count (The Project Crimson Trust)
Coalition for Rainforest Nations	New Zealand Church Missionary Society Trust Board	University of Auckland
Collective Intelligence - Eva Gluyas Scholarship	New Zealand Festival	University of Canterbury
Diabetes Wellington	New Zealand Opera	University of Waikato
Eat My Lunch	Ole Football Academy	Upaya Institute
Ekos	Omanu Beach Surf Life Saving Club	Virtuoso Strings
Endometriosis NZ	OMF Homeside Trust	Wai NZ/ River Watch
Finding Refuge	OMF NZ	Waiheke Budgeting Services Trust
First Foundation	Ora New Zealand	Waiheke Island Toy Library
Forest & Bird	Papakura Kootuitui Trust	Waitangirua Church of Samoa
Fred Hollows Foundation	PARS	Wangapeka Study and Retreat Centre
Gautama Buddha Free School	Peoples Project (Wise Management Services)	Wellington City Mission
Generation Zero	Permaculture New Zealand	Wellington Free Ambulance
Globaia	Rainforest Foundation US	Wellington Shambhala Centre
Hands on Global	Rigdzin Bum Tsog Trust	Wesley Community Action
Happen Films	River Aotearoa Charitable Trust	Women for Women
Hillary Institute	Rod Donald Trust	Women's Refuge New Zealand
Himalayan Trust New Zealand	Royal New Zealand Ballet	World Future Council
Human Age Reversal Project	Salvation Army	World Vision
I have a Dream Charitable Trust	Samaritans of Wellington	Youth Development Trust Wellington
Information Technology & Innovation Foundation		Zeal Education Trust
Inside Out		
In-Sight Collaborative		
InterCP		
Kaibosh		

You can make good happen with The Gift Trust.

The world is home to lots of organisations who are doing amazing things in their communities and environments. Just as importantly, it's home to people who can enable these heroes to do more good, by providing the money they need.

The real magic happens when these parties connect. That's what we do.

At The Gift Trust our purpose is to simplify generosity, to make good happen. We talk to each donor about your values and dreams for the world, identify the most effective organisations and then monitor progress, to ensure your gift truly is making good happen. We connect your giving with those organisations who are making the biggest difference on the ground, in the areas you care most about. It's personalised giving made easy, so that you can give with greater confidence and deeper effect.

If you're an individual, family or business with \$5,000 to over \$1m to give, and want to make sure it goes into the hands that will use it best, talk to us today.

Together, we'll make good happen.

Get in touch to find out more:

(04) 391 4438

info@thegifttrust.org.nz

thegifttrust.org.nz

The Gift Trust is a New Zealand registered charity: CC40774



ANMURE BRIDGE SCHOOL





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