

Gift Account fees

What fees pay for

The Gift Trust is a not-for-profit and funding for our operations allows us to provide you with services that support your giving. This covers Gift Account operating expenses such as donation advice and support, grant-making, record keeping, annual accounts, quarterly statements and other legal and financial responsibilities.

Fees

Account size	Fee % (p.a on balance)
First \$100,000	2.0%*
Next \$400,000	1.25%
Over \$500,000	1.0 %
<i>*Minimum annual fees apply - \$300 for accounts under \$20,000 and \$500 for accounts over \$20,000.</i>	
<i>For accounts over \$20,000, fees are generally covered by your investment growth. All growth on gift accounts is tax-free.</i>	

Fee examples	
Account size	Total fee p.a.
\$5,000	\$300*
\$20,000	\$500*
\$150,000	\$2,625
\$600,000	\$8,000
\$1,000,000	\$12,000
<i>*Note: annual account fee minimums apply.</i>	

Additional fees:
Accounts below \$50,000 can make one donation distribution to charity per year for free but any more are charged a transaction fee of \$50 per donation.
Transaction fee of \$100 for donations to non-registered or international charities.
If 80% or more of the funds contributed to a Gift Account are distributed during the year we will charge a fee of 2% of the total funds contributed.
Gift Accounts managed by a financial adviser will be subject to further investment fees, as set by the financial adviser (see our Investment Options document).
Bespoke charitable research such as finding charities in a particular sector or developing a philanthropic strategy will be charged at \$150 per hour.

How fees are charged

For accounts over \$100,000 fees are charged quarterly, based on the account's balances for the previous quarter. For accounts under \$100,000 fees are charged annually.