



For US donors: How to donate to The Learning Environment via The Gift Trust

The Gift Trust, a New Zealand registered charity and philanthropic trust (charity registration number CC40774), is helping The Learning Environment with their international fundraising mechanisms to enable them to receive funding for their important work.

The Gift Trust can receive tax deductible donations from US tax residents and these can be tagged for The Learning Environment. The Gift Trust receives US donations via our partnership with the US donor-advised fund RSF Social Finance. The account is called 'Friends of The Gift Trust NZ'. Any donations to it will receive a US tax receipt and will be eligible for US tax benefits. Donations can be made in cash, shares or securities.

For administration reasons, the minimum donation that donors can give is US\$1,000.

How to donate by credit or debit card

1. Go to <https://rsfsocialfinance.org/give/give-to-rsf-projects/give-today-projects>.
2. Select 'Friends of The Gift Trust' from the drop-down menu.
3. Enter the amount you'd like to donate, and click 'Donate Now'.
4. On the next page, enter your contact and payment information, and note in the 'Additional information' field that you'd like your donation to go to The Learning Environment.
5. Click 'Submit' to complete your donation.

How to donate by wire transfer or stock gift

To donate by wire transfer or stock gift, please contact Agustina Singh at RSF Social Finance: agustina.singh@rsfsocialfinance.org. Let RSF know whether your donation is by wire transfer or stock gift, and to allocate it to 'Friends of The Gift Trust' for The Learning Environment.

You'll also need to give your bank or broker RSF's bank and brokerage information.

RSF bank details for wire transfers

Beneficiary: RSF Social Finance, P.O. Box 2007, San Francisco, CA 94126

Bank name: Beneficial State Bank

Bank location: 1438 Webster Street, Suite 100, Oakland, CA 94126

ABA/Routing #: 121182056

Account number: 9800005986

For Further Credit: Rudolf Steiner Foundation, Inc.

Account: 820015204

RSF brokerage details for stock gifts

DTC #: 0164

Account holder: Rudolf Steiner Foundation



Account number: 2003-3992
 Custodian: Charles Schwab & Co

Fees

Two sets of fees apply:

1. The Gift Trust will charge a fee to cover our due diligence on The Learning Environment and to receive and transfer the funds.
2. RSF Social Finance will charge a fee to receipt the donations in the US and transfer them to The Gift Trust.

The Gift Trust fee structure

| Donation amount (NZD once converted) | The Gift Trust fee |
|--------------------------------------|--------------------------|
| Up to \$99,999 | 3% of the donation value |
| \$100,000 to \$499,999 | 2% of the donation value |
| Over \$500,000 | 1% of the donation value |

RSF Social Finance fee structure

RSF will charge 2.6% *per annum* of the funds held in the account. For example, if the funds are held for 1 month by RSF before being transferred to NZ, you will only pay 1/12th of 2.6%. There is also a transaction fee of US\$350 per quarter (split between all the donations transferred that quarter).

Example fee calculations

| Donation amount (NZD once converted) | RSF Social Finance fee | | | The Gift Trust fee | | Total fees |
|--------------------------------------|------------------------|--|---------|--------------------|--------------------|------------|
| | % per annum | Number of months funding is held before transfer | RSF fee | % | The Gift Trust fee | |
| \$20,000 | 2.6% | 2 | \$87 | 3% | \$600 | \$687* |
| \$100,000 | | | \$433 | 2% | \$2,000 | \$2,433* |
| \$500,000 | | | \$2,167 | 1% | \$5,000 | \$7,167* |

*Plus an equal share of the quarterly USD \$350 transaction fee



For more information

For more information, contact Cheryl Spain, Executive Director, The Gift Trust:
cheryl@thegifttrust.org.nz | thegifttrust.org.nz | +64 4 391 4438