



Thank you for choosing Taranaki Foundation to invest your funds, ensuring maximum impact for important causes in our Taranaki region.

To make sure we understand your wishes clearly and kickstart our conversation about your giving, please complete this form with as much detail as possible. Your information will remain confidential and does not create any legal obligations.

Donor Details

| | |
|---------------------------------------|--------|
| Name(s): | |
| Address: | |
| Fund Name (the fund will be know as): | |
| Lawyer/Advisor (if any): | |
| Date: | Phone: |
| Email: | |

Gift Details

| | |
|--|--|
| <input type="checkbox"/> Individual <input type="checkbox"/> Family <input type="checkbox"/> Charitable organisation <input type="checkbox"/> Business/Corporate | |
| Gift Type <input type="checkbox"/> Establishing a Named Fund (Endowment) <input type="checkbox"/> Bequest <input type="checkbox"/> Trust Transfer <input type="checkbox"/> Scholarship <input type="checkbox"/> Memorial Fund to honour a loved one <input type="checkbox"/> Contributing to an already established Fund <input type="checkbox"/> One-off gift <input type="checkbox"/> Other _____ | Gift Amount <input type="checkbox"/> A percentage of my estate: _____ % <input type="checkbox"/> Estimated dollar amount: \$ _____ If you plan to give now and spread your gift over time, please specify your preferred instalments. <input type="checkbox"/> Monthly \$ _____ per month <input type="checkbox"/> Annual \$ _____ per year <input type="checkbox"/> Establishment Donation _____ |
| Establishment Donation Donors are also invited to consider a one-off establishment donation to help cover the Foundation's costs in setting up and administering your Fund. This contribution can be now or in your will as part of your gift. | |

With Taranaki Foundation, your generosity today will make a lasting difference for the future of our region.

Fund Purpose

Please select how you would like investment returns from your Fund to be distributed.
You may select one or more of the following options to reflect your intentions.

☐ Unrestricted

I wish to use this gift to address the greatest future needs of the Taranaki community.
____ % to be distributed through unrestricted distributions.

☐ Targeted

I wish to use this gift to support the following area(s):

| | |
|--------------------------|---------|
| Arts & Culture | _____ % |
| Children, Youth & Family | _____ % |
| Aged Support | _____ % |
| Education | _____ % |
| Health/Wellness | _____ % |
| Recreation/Sport | _____ % |
| Strong Communities | _____ % |
| Environment | _____ % |

☐ Tagged

I understand that if my gift is \$50,000 or more, I can direct the investment returns to a registered charity or charities of my choice.
____ % is to be distributed to the registered charity of my choice: _____

☐ Established Community Fund

I wish to support one or more of the Foundation's existing Community Funds (set up by local organisations for their long-term sustainability). For the full and up-to-date list, visit: taranakifoundation.org.nz/establishedcommunityfunds

| | |
|--|---------|
| Coach McKean Fund | _____ % |
| Conductive Education Fund | _____ % |
| Daphne Cancer Care Fund | _____ % |
| Destination Kāwaroa Legacy Fund | _____ % |
| East Taranaki Environment Collective Fund | _____ % |
| Friends of the New Plymouth Opera House Fund | _____ % |
| George Mason Charitable Trust Endowment Fund | _____ % |
| Help a Taranaki Child Trust Fund | _____ % |
| Hospice Taranaki Fund | _____ % |
| NPBHS Perpetual Fund | _____ % |
| NPGHS Fund | _____ % |
| New Plymouth Riding for the Disabled Fund | _____ % |
| Noel Yarrow Puke Ariki Fund | _____ % |
| Ōpunake High School Fund | _____ % |
| Puke Ariki Fund | _____ % |
| Rural Medical Immersion Programme Fund | _____ % |
| South Taranaki Community Projects Fund | _____ % |
| Taranaki Foundation Operational Fund | _____ % |
| Taranaki Foundation General Fund | _____ % |
| Taranaki Golf Fund | _____ % |
| Taranaki Health Fund | _____ % |
| Taranaki Regional Disaster Relief Fund | _____ % |
| Taranaki Retreat Legacy Fund | _____ % |
| Taranaki Youth Boost Fund | _____ % |
| The Swingiest Fund for Generations of Art Lovers | _____ % |
| TOPEC Legacy Fund | _____ % |
| Waitara High School Massey Trust Fund | _____ % |
| YMCA Rough Sleeping Shelter Fund | _____ % |
| Support for (please specify fund/s): | _____ % |

Fund Management

All gifts are invested in line with Taranaki Foundation's Statement of Investment Policy and Objectives (SIPO). A Named Fund can be established from \$50,000 (which can be built up over time), with an annual fee (currently 1%) charged on all funds under management to support the Foundation's operations.

Next Steps

☐ I/We would like to discuss our intentions further with the Foundation team.

Please contact me by: ☐ Phone ☐ Email

Thank you for considering making your charitable gift through the Taranaki Foundation.
Please reach out with any questions;

Josh Hickford Chief Executive
027 462 1412
josh@taranakifoundation.org.nz
taranakifoundation.org.nz

Please return this form to:

Taranaki Foundation
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New Plymouth
info@taranakifoundation.org.nz