



Information for Professional Advisors



info@taranakifoundation.org.nz

www.taranakifoundation.org.nz

+64 27 853 4483



GUIDANCE FOR PROFESSIONAL ADVISERS

Many of your clients may be thinking about giving something back to their community but may not know how and where their generosity can have the biggest impact.

Research tells us that more and more people are leaving a percentage of their estate to a charity, project, or area of interest. Because Taranaki Foundation is a local organisation, we understand our communities and how your clients can collectively make the greatest impact for our region.

Taranaki Foundation can support you in having these conversations by offering philanthropic expertise to help your clients – helping us to drive more local generosity to local causes.

How we can help

At Taranaki Foundation, we can provide the philanthropic advice you need to help your client achieve their charitable goals. As an adviser you play a key role in helping your clients to integrate their philanthropic goals into major personal, business and financial decisions. Taranaki Foundation offers your clients a personal and enduring way to leave a lasting legacy that will benefit their community forever.

Ways to give

There are a variety of ways for your clients to give through the Taranaki Foundation. All options can be designed to help them make the most of tax benefits during their lifetime, maintain their financial security, and of course, look after family first.

Gifts can be made in a number of ways:

- As an individual, family or organisation, your client can set up their own Named Fund or contribute to an established endowment fund.
- Your clients can give to Taranaki during their lifetime so that they can enjoy seeing the results of their generosity, as well as receiving the benefits of tax credits.
- Your clients may choose to donate through their will or by a distribution from their family trust. Gifting by will and from a trust may create or add to existing endowments.

There are many benefits of giving through Taranaki Foundation:

- Our regional focus and local expertise allows your client' to give to Taranaki causes they are passionate about, supporting their community forever.
- Because endowments are permanent your client's gift keeps on giving, now and for generations to come.
- A Named Fund enables your client to specify the name of their fund and the organisations or initiatives they wish to support.
- Annual updates enable your client to keep track of their fund's earnings and distributions.
- The reputable trustees and prudent stewardship of Taranaki Foundation funds ensure that your client's gift is in safe hands.
- Donations made to the Taranaki Foundation may qualify for a tax credit
- Taranaki Foundation can provide you with guidance and resources to assist you in establishing your client's endowment fund.

Taranaki Foundation



“We are unashamedly Taranaki. Taranaki Foundation is about Taranaki people leaving a lasting gift for Taranaki people.”

Bryce Barnett. Chair, Taranaki Foundation

Community foundations are independent, not-for-profit organisations located across the country. We are different because we aren't about one single cause; we are about a place and its people.

We are here to nurture and build the prosperity of our region. We do this by connecting generous people to activities that create transformational differences, and by providing philanthropic advice, community knowledge and leadership.

We are guided by our donors. Through us, donors can choose which local projects and causes they want to invest in and play a role in positively transforming their community. Our smarter giving model means that any donations received will last for generations.

We're here to help

We work alongside you and are here to answer your questions. We can speak to your clients about philanthropy and where the great, impactful work is taking place in our community.

We want to ensure you feel informed of the value-add we can provide and would be delighted to come and present to your board, clients, and team.

Resources

We can provide legal advisers with sample will clauses and memorandums of wishes to assist in establishing your fund.

For further assistance, please contact:

Taranaki Foundation

Email info@taranakifoundation.org.nz

027 853 4483

Taranaki Foundation is a registered charity with NZ Charities Commission #CC51935