

# FACT SHEET - For Professional Advisors



## We are here to help

We are proud to partner and maintain strong relationships with local professional advisors like you.

Working together we can help your clients leave a personal, meaningful and lasting legacy for our community.

You know your clients.  
We know philanthropy.



## Discussing charitable giving with clients

New Zealand is one of the most generous countries in the world. It's not surprising that many of your clients may be thinking about giving something back to their community but may not know how or where their generosity can have the most impact.

Your clients rely on your guidance to make important financial decisions. When it comes to charitable giving, we can partner with you to simplify their giving and amplify their impact.



**For me, the Taranaki Foundation is a valuable partner to which I refer clients when they have charitable intentions but have uncertainty about their charitable giving options."**

**Steve Waite - BDO Taranaki**

## We can help you:

- Identify your clients' charitable giving interests and motivations
- Provide information on giving options
- Tailor-make a giving plan
- Manage the administration
- Provide local knowledge on organisations doing impactful work in our community
- Offer advice and resources on how to include philanthropy in your wealth planning conversations.



**Taranaki  
Foundation**  
Inspiring. Giving.

## The philanthropic conversation

Philanthropy is a very personal decision.

As a professional advisor, you represent one of the most vital groups of stakeholders that helps Taranaki Foundation nurture and build the prosperity of our region through philanthropy.

## Life's milestones

These are key events in a client's life that can open up the greatest opportunity for a conversation about charitable giving:

- Retirement
- Estate planning
- Selling a business
- Sale of assets
- Year-end tax planning
- Inheritance
- A major life event

## Tips for starting your philanthropy conversations

- Advise your clients to consider family first.
- Explore your clients values, interests and passions and ask questions such as:

"How does your current charitable giving align with your values and interests?"

"Are you currently involved with any non-profit organisations? And, "Are there any particular causes you care about?"

"Do you typically support the same charities every year?"

"Have you considered leaving a gift in your will to a charity or cause you care about?"

## Motivations behind philanthropy



Community impact



A passion for a cause



A desire to give back



Reassurance that their wealth will be used wisely



Personal Legacy



**Imagine if people were to leave ten percent of their estate to the community through Taranaki Foundation. What a great benefit that would be for Taranaki."**

**Ken Horner - Halliwells, Hawera**

## Let's work together

Taranaki Foundation is the charitable foundation established for Taranaki, our people and the causes that are important to us.

We can provide the philanthropic advice you need to help your client achieve their charitable goals. We look forward to working alongside you.

**GIVING**  
**INSPIRING**