

# Trust Transfers

## Taranaki Foundation offers a simple, powerful and practical solution for the resettlement of Charitable Trusts

### What is a Trust Transfer?

A trust transfer or trust resettlement is a simple way to wind up a trust while still maintaining the original purpose and legacy of the Trust.

Operating a trust or charity has become increasingly challenging with new legislative changes, finding new trustees, investing capital and increasing compliance expectations. Trusts and Societies are looking for a solution. They don't want to lose the history of their charity but realise they can't continue in their current structure. A Trust Transfer through Taranaki Foundation may be the answer.

### How does it work?

- Your Trust or organisation sets up a Named Fund with Taranaki Foundation.
- You set the purpose of the new fund, which would likely align with your original purpose.
- Grants are distributed every year, forever — creating a permanent funding stream for the causes you are passionate about.
- Your Trust will benefit from our low-cost structure and economies of scale so your generosity can continue to be felt for generations to come.
- A portion of the income is distributed each year to the community while some income is retained to grow the fund.
- Taranaki Foundation produces annual reports of returns and distributions.

### Why is Taranaki Foundation a good option?

- No loss of identity or purpose: Retain the same name and mission but let us do the hard work.
- Funds are managed by investment advisors in line with our Statement of Investment Policy and Objectives (SIPO).
- We take care of all the legal, administrative, distributing and reporting requirements — leaving you free to focus your time and energy on the work your Trust or Society was created to do.
- Grants are distributed every year, forever — creating a permanent funding stream for the causes you are passionate about.
- Benefit from our volunteer Board of Trustees with a diverse set of skills and a deep connection and love for our local community.
- Revitalise your Trust's story. We will ensure your Trust's story is told long into the future.

“The income from the Fund will continue to be distributed according to our wishes for perpetuity, which is most important to us.”

Kevin Murphy,  
New Plymouth Opera  
House Fund

## A safe pair of hands for the next chapter of your Trust

### Secure your Trust's future

Since the transfer of the Winifred Knight Trust in 2015 at it's original value of \$206,000, the Fund has given out over \$55,000 in grants through our annual funding round; and the initial gift, net of grants distributed has grown to be over \$240,000.

Through this Fund, Taranaki Foundation supports community organisations active in South Taranaki. It also continues to honour the Winifred Knight Trust's commitment to the Ohangai School Community to provide a scholarship each year to a Te Paepae o Aotea School student to support their first year at Teacher Training College.

The growth in the Fund, while also making significant grants, shows the power and potential of our perpetual endowment model and why transferring your Trust might be right for you.

### What is a Community Foundation?

Community Foundations are local, independent, and not-for-profit. They run a well-proven model of giving which has been growing across the world for over 100 years, and they are now established in 17 regions across Aotearoa New Zealand. Community Foundations build long-term, reliable funding streams for their local communities by investing and growing the donations they receive.

### Taranaki Foundation

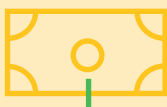
Taranaki Foundation is your Community Foundation. We exist to help nurture and build the prosperity of our region. We do this by connecting generous people with projects and causes they are passionate about.

Governed by a group of experienced volunteer trustees, we provide a trustworthy vehicle for you to contribute to the local causes that really matter to you. We provide the charitable framework, expert financial oversight and governance to ensure your giving generates the maximum good and creates an inter-generational legacy.

## Together, we are building reliable long-term funding streams to support our community forever

Taranaki Foundation understands that building healthy, vibrant communities requires long-term, sustainable support and resources. That's why we invest and grow the gifts we receive, however big or small, to create positive change in our region — both now and for generations to come.

**Your donation**



**is invested and grows over time to help**



**our region**



**and our community**



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

**Josh Hickford**  
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TARANAKI FOUNDATION \ Trust Transfers

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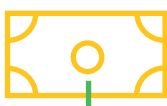
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