

# Super Legacy Fund

## Giving through your superannuation to create lasting local impact.

We believe in a better Taranaki for all. Gifts to Taranaki Foundation are invested to create a permanent source of funding, supporting the people, projects, and places our community cares about, now and for generations to come.

One meaningful and often overlooked way to give is through your superannuation. If you are in the fortunate position where you don't need all of your super to support your retirement, redirecting part or all of it can make a powerful difference right here - at home.

### How Super Legacy Fund Works

- Choose how much you give and when. You can start, pause, or stop at any time.
- Make a one-off or regular contribution. Donations are eligible for a tax credit up to your accessible income. We provide an annual donation receipt so you can claim your tax credit with ease.
- You decide where to direct your gift: to the Taranaki Foundation General Fund, an Established Community Fund, or to support Taranaki Foundation Operations.
- Your donation is pooled and invested through Taranaki Foundation's perpetual endowment model, protecting the original gift while generating income each year. This ensures your generosity multiples over time.
- Your generosity is stewarded with care, transparency, and long-term vision.

### 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 18 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**

"I didn't want to set up a whole trust or deal with red tape. The Foundation helped shape something simple and sustainable, and made it easy to align my giving with what I care about."

Richard Tait  
Taranaki Foundation  
Donor

## Super Legacy Fund | Gift Intention Form

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.

|                     |  |
|---------------------|--|
| <b>Name(s)</b>      |  |
| <b>Address</b>      |  |
| <b>Phone Number</b> |  |
| <b>Email</b>        |  |

|                              |                          |                              |                          |                     |
|------------------------------|--------------------------|------------------------------|--------------------------|---------------------|
| <b>Value of donation</b>     |                          |                              |                          |                     |
| <b>Frequency of donation</b> | <input type="checkbox"/> | Weekly                       | <input type="checkbox"/> | Fortnightly         |
| <b>Donation to support</b>   | <input type="checkbox"/> | Taranaki Foundation          | <input type="checkbox"/> | Taranaki Foundation |
|                              | <input type="checkbox"/> | General Fund                 | <input type="checkbox"/> | Operational Fund    |
|                              | <input type="checkbox"/> | Other Fund   Please specify: |                          |                     |

|                            |   |
|----------------------------|---|
| <b>Donation method</b>     | Set up Payment to Taranaki Foundation bank account:<br><b>TSB Bank: 15-3959-0698836-00</b><br><b>Reference: SLT (Super Legacy Taranaki) – along with your last name</b> |
| <b>Donation receipt</b>    | You may be eligible for a 33.33% tax refund (up to the value of your taxable income).<br>Taranaki Foundation will provide an annual donation summary receipt.           |
| <b>After your donation</b> | You can start, stop, or adjust your donations whenever it suits you.  |

### Acknowledgement:

- I/We wish to donate to the Taranaki Foundation through the Super Legacy for Taranaki initiative.
- In making this donation, I/we understand that all monies gifted to and received by Taranaki Foundation are absolute gifts.

|                     |  |
|---------------------|--|
| <b>Signature(s)</b> |  |
|---------------------|--|

Thank you for considering making your charitable gift through Taranaki Foundation  
Please reach out to talk through your options, we are here to help.

Josh Hickford 027 462 1412 [josh@taranakifoundation.org.nz](mailto:josh@taranakifoundation.org.nz)  
Theresa Cayley 027 244 8688 [theresa@taranakifoundation.org.nz](mailto:theresa@taranakifoundation.org.nz)