

Professional Advisors

Helping your clients achieve their charitable goals.

Your clients may be thinking about giving back to their community but may not know where their generosity will have the greatest local impact. As the intergenerational wealth transfer accelerates over the coming decades, there is a huge opportunity to grow charitable giving and make a real difference in our community.

As a trusted advisor, you are often the first person clients turn to for guidance that aligns financial outcomes with personal values. Taranaki Foundation partners with advisors, bringing local knowledge and philanthropic expertise to help clients leave a personal, meaningful, and lasting legacy.

Why talk to clients about charitable giving?

More New Zealanders are choosing to leave a portion of their estate to causes they care about. Life milestones often create natural opportunities to explore what matters most to your clients and the legacy they want to leave, including:

Retirement, selling a business, an inheritance, estate planning, children leaving home or year-end tax planning.

Starting the conversation

These simple questions can help open up meaningful conversations about your clients' values, interests and passions:

- Are there charities you currently support?
- Are there causes you care about?
- Have you thought about leaving a gift in your Will?
- How do you want to balance family priorities with charitable goals?

How we partner with you

We work alongside advisors to turn clients' charitable intentions into community impact.

Our support can include:

- Identifying clients' giving interests
- Providing clear guidance on giving options
- Tailoring giving plans to align with financial and estate goals
- Sharing local knowledge of causes and community needs
- Joining client meetings to make charitable planning simple, effective, and meaningful

Resources for Advisors

We can provide:

- Sample will clauses
- Memorandums of wishes
- Guidance to support philanthropic planning conversations

We would be delighted to present to your board, clients, or team to show how we can support your practice and your clients' giving goals.

"I've always said I'm worth more dead than alive. But seriously, I've had a good life — and now it's time to pass something on that will outlive me."

Richard Tait, Donor
Taranaki Foundation

Giving through Taranaki Foundation

We help fulfil your clients' giving wishes with flexible options. Gifts can be made by individuals, families, or organisations, and clients can decide when, how, who, and in what form they give.

Through our Smarter Giving model, donations are pooled, professionally invested, and managed as a perpetual endowment, ensuring that donations received today will continue to benefit our community for generations to come.

Clients can give in several ways:

- Establish a Named Fund — A fund in their name, family name, or organisation
- Contribute to an Established Community Fund — Support long-term local impact
- Give During Their Lifetime — Make a gift now and receive tax credits
- Give Through a Will — Create or add to an endowment
- Trust Transfers — Transfer assets from inactive or winding-up trusts to continue the charitable purpose.

Benefits of Giving Through Taranaki Foundation

- A regional focus with deep local expertise
- Support for causes your clients are passionate about, now and forever
- Permanent endowments that keep giving for generations
- Named Funds that honour your client's legacy and specify causes or organisations
- Annual reporting on fund earnings and distributions
- Reputable trustees and prudent stewardship
- Donations may qualify for a tax credit
- Guidance and resources to help establish your client's endowment fund

Our smarter giving model ensures that donations received today will continue to benefit our community for generations to come.

Creating a lasting local legacy

In 2021, Stratford-born Bruce Carter, established a Named Fund with Taranaki Foundation, ensuring his donations continue to support his chosen causes long after he has passed.

"I really liked the idea of a personal endowment fund that is invested and will go on giving. It's been a big worry in my mind, having no immediate family, nobody to leave anything to. It wasn't until I spoke with my accountant about estate planning that I heard about Taranaki Foundation. I found out I could start a fund—they take the worry out of charitable giving."

Motivations Behind Philanthropy



Community impact



A passion for a cause



A desire to give back



A reassurance that their wealth will be used wisely



Legacy

"The 90/10 idea struck me — give most to family, and a portion to charity. It helps clients give back to the region they love, without compromising family security. We see it as planting seeds for the future and normalising giving as part of a well-rounded legal conversation."

— Tim Coleman,
Director Connect Legal

For further assistance, please contact:

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