

Professional Advisors

Helping your clients achieve their charitable goals.

Your clients may want to give back but be unsure where their generosity will have the most impact locally. As the intergenerational wealth transfer accelerates over the coming decades, there is a huge opportunity to grow charitable giving in Taranaki.

As a trusted advisor, you are often the first person clients turn to for guidance. Taranaki Foundation partners with advisors to provide local knowledge and structured giving solutions that help clients create a personal, lasting legacy.

Why talk to clients about charitable giving?

More New Zealanders are choosing to leave a part of their estate to causes they care about. Life milestones create natural opportunities to explore what matters most:

- Retirement
- Selling a business
- Receiving an inheritance
- Estate planning
- Children leaving home
- Year-end tax planning

These milestones often prompt clients to reflect on their values and how they want their giving to make a difference.

Starting the conversation

These questions can help explore your clients' priorities:

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

How we partner with you

We work alongside advisors to turn charitable intent into lasting 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

Resources for Advisors

We provide tools to support you and your clients::

- Sample Will clauses
- Memorandums of Wishes
- Guidance for philanthropic planning conversations

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

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

Steve Waite
BDO Taranaki

Legacy in action

In 2021, Stratford-born Bruce Carter, established a Named Fund with Taranaki Foundation so his donations can keep supporting his chosen causes long after he's gone.

Bruce spent 50 years working in Australia but returned to Taranaki in retirement. With no immediate family, he wanted a way to give back to the region he calls home,

"I really liked the idea of a personal endowment fund that is invested and will go on giving. It was a big worry, having no immediate family. 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."

Ways to Give

- Establish a Named Fund — in your name, family name, or organisation
- Support an Established Community Fund — contribute to long-term local impact
- Give During Your 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
- Projects and Campaigns - support community fundraising initiatives
- Superannuation Giving - redirect part of your super

Why Give Through Taranaki Foundation

- Local knowledge — support causes that make a real difference in Taranaki
- Personal giving — clients choose the causes they care most about
- Lasting impact — invests and protects gifts so they grow to become an ongoing source of funding.
- Named Funds — honour client legacies with a fund in their name.
- Trusted oversight — experienced trustees and robust granting and investment policies, gift is in safe hands.

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



Partner with us to help your clients achieve their giving goals. Contact us to discuss giving options or arrange a presentation.

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Taranaki Foundation is a registered charity (CC51935)
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"The 90/10 approach - giving most to family and a portion to charity, helps clients support their region without compromising family security. It normalises giving as part of estate planning."

Tim Coleman, Director, Connect Legal