

# The Benefits your Community Foundation offers.

If you are looking for a knowledgeable partner to enable your philanthropy, a simple and efficient structure you can plug into, and a way you can focus on the giving and the impact – not the administration – then your community foundation is the best way to give to the causes you are passionate about.

## **You design the brief.**

You design your philanthropic brief with a “donor directed” fund. The causes, objects, recipients and distribution policy are for you to direct. That can change and grow with time. You are not locked in to someone else's ideas. This is your baby – but with shared parenthood with Auckland Foundation, with a long term horizon.

## **Simply plug in.**

You plug into an existing structure – you don't have the hassle of setting up, registering and then running a separate charity. Annual reports, Charities Service registration, and ongoing compliance are already done for you. You concentrate on the fun part of growing your fund and applying its investment return to causes you are passionate about.

## **Retain your own brand.**

You can have all the independence of branding your fund as your own. Auckland Foundation is in the background as your silent partner in effective philanthropy. You can still have your Family Foundation name if that's what you want.

## **Ready-to-go trustee expertise.**

Finding, training and maintaining the involvement of good trustees is not easy. With Auckland Foundation you have a ready-made trust board, but you can decide your own level of oversight alongside it. This can be through an advisory trustee, an advisory committee or a “protector”. Formal or informal, this structure allows you to agree with Auckland Foundation the frequency size and direction of gifts, consistent with long term objectives.

## **Solid funds management.**

You tap into established fiduciary investment expertise with Harbour Asset Management – Morningstar NZ Fund Manager of the year 2017. Your fund is reported on regularly. You can have elements of the fund held for short, medium or long term investment, depending on your expectations for distribution. We emphasise a long term focus until your fund reaches a solid level of endowment.

## **A partner with granting 'grunt'.**

With Auckland Foundation you partner with an organisation that knows the issues facing our communities. We already grant more than \$1 million annually, so we see where generosity gets the best results and share that knowledge with you.

## **Only Auckland profits.**

We seek only to cover our costs, and have no mandate to profit commercially from your endowment fund and giving. We share your goals of maximizing returns and in doing so aim to provide you with the efficiencies and expertise only a community foundation can offer.

**Contact Auckland Foundation Partnership Director, Liam Willis, on 027 627 4048.**