

Help your clients on their Philanthropic Journey.

As Professional Advisers, you have the opportunity to help your clients achieve their charitable goals, through planned giving that blends philanthropy with overall financial and estate planning.

When you partner with Auckland Foundation, you gain full access to the philanthropic expertise your clients are looking for. You will always retain complete control of your client relationships, while we act as a partner and resource to help fulfil their charitable goals.

How can we help?

- Help you develop a deeper, richer client relationship.
- Assist as a referral service to your clients who have complex philanthropy objectives.
- Provide philanthropic consulting if you want to research a particular philanthropic program.
- By incorporating philanthropy, in particular the community foundation model into your client's wealth plan, you stay competitive if not "ahead" of your competition.

Auckland Foundation will tailor presentations and seminars for you, your colleagues and your clients.

Contact Liam Willis on 027 627 4048 or liam@aucklandfoundation.org.nz