

Auckland Foundation - Supporting Your Giving

**Auckland
Foundation**

Towards a thriving Tāmaki Makaurau



Who are we?

Purpose

**Support the
future of
Auckland**

Mission

**Simplify
giving
for good**

Vision

**A thriving
Tāmaki
Makaurau**

Auckland Foundation is the community foundation for the Auckland region.

Community foundations are a proven global philanthropic model that have been providing donors with a bespoke service to support their legacy and living giving since 1914. Donors are supported with efficient charitable structures and expert community knowledge and insight to achieve their philanthropic goals in perpetuity.

Through our efficient governance and administrative services, donors create and direct funds with freedom to focus on the transformation they want to create in areas they care about.

The community foundation model was brought to New Zealand over 20 years ago by Sir Stephen Tindall after seeing how successful the model was in growing philanthropy and supporting communities in perpetuity overseas. The Tindall Foundation remains a strong supporter of the network of community foundations across New Zealand and Sir Stephen is an Ambassador for the national network.

[Our People →](#)

Community Foundations of New Zealand

Community foundations work with individuals, families, businesses, existing Trusts and other organisations in New Zealand to establish Donor Advised Funds that are the philanthropic platform for their giving. This is an alternative to establishing a separate Charitable Trust which requires its own administration, management, compliance, regulatory requirements, and accountability structures. A Donor Advised Fund provides the same philanthropic outcomes as a separate Charitable Trust, without the burden and cost. Efficiencies are created for both those giving and those receiving funds.

As a not for profit organisation, Community foundations are not attached to any specific financial institution. They are embedded in the communities they serve and are well placed to offer insight and advice.

Community foundations have a protective responsibility over the DAF's they hold in perpetuity and take this responsibility seriously. Every distribution made is put through a thorough due diligence process and it is imperative that the charitable purpose of the DAF is upheld.



Donor Advised Funds

Donor Advised Funds (DAF's) are the fastest growing philanthropic vehicle in the world. Our DAF's give donors the ability to set aside charitable funds, receive immediate tax and pooled investment benefits, and create impact for the projects and causes they care about.

Donor Advised Funds allow people to be strategic about their giving, now and in perpetuity. Donors can establish a DAF at any point in their life and see the impact they are creating through living giving and connection to recipients. Additionally, donors tell us leaving a gift in their Will to their DAF is an important part of their strategic giving planning.

Through Trust resettlement, Auckland Foundation offers a simple succession plan for existing Trusts. The charitable purpose of the Trust is maintained in perpetuity and the activity of the Trust continues seamlessly.

As we see the shift of wealth between generations, there is a real opportunity to create strategic, intergenerational impact in our communities and DAF's are well placed to support this.

From cases across the world we hear that Donor Advised Funds provide a more strategic, effective and cost efficient option for giving to charitable causes.

What is the process?

Learn



We'll discuss your passions or help you identify the causes you care deeply about, learn about what is important to you, and talk about how we can help.

Guide



We'll guide you through the process of setting up a fund, one step at a time. Phone calls, emails, or in-person meetings.

Donate



We'll work on the detailed documentation so you won't have to. Then you make a donation to establish your fund. It's that easy.

Establishing a Donor Advised Fund

Auckland Foundation works with you to establish the charitable structure of your Donor Advised Fund (DAF) through a supplementary deed. The supplementary deed is the legal structure that supports your charitable purpose in perpetuity and within which monies or other assets are received and distributed. Supplementary deeds sit underneath the Auckland Foundation Trust deed. All activity relating to funds are bound within the terms of the DAF and it is the responsibility of Auckland Foundation to ensure these terms are upheld forever.

Auckland Foundation takes care of...

Governance

- Independence
- Enduring Trusteeship
- Credibility in the sector
- Sustainability

Compliance

- Accounts, audits, financial reporting
- Regulatory requirements
- Risk management

Admin & reporting

- Receive, receipt & manage all donations
- Quarterly reporting on activity
- Investment management through our partners

Grant making

- Manage conflicts of interest
- Transparency
- Review asset allocation annually to ensure granting needs are met
- Manage accountability requirements
- Up to date knowledge of charitable causes

Succession & future activity

- Bequest pipeline guidance & management
- Broadening of networks
- Leveraging comms & marketing
- Involve members in grant making decisions

So you can focus on...

learning about
the causes
that are close
to your heart

deciding
what projects
you want to
support

[Examples of Causes →](#)

[Impact Videos →](#)

RESPECT

Facilitating respectful relationships by increasing safety and reducing violence.

Camp Quality

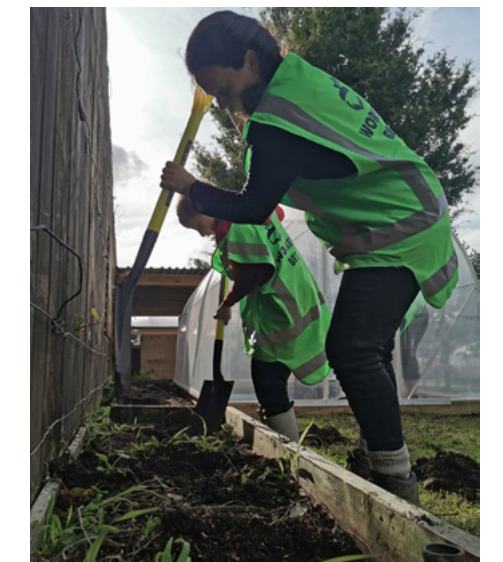
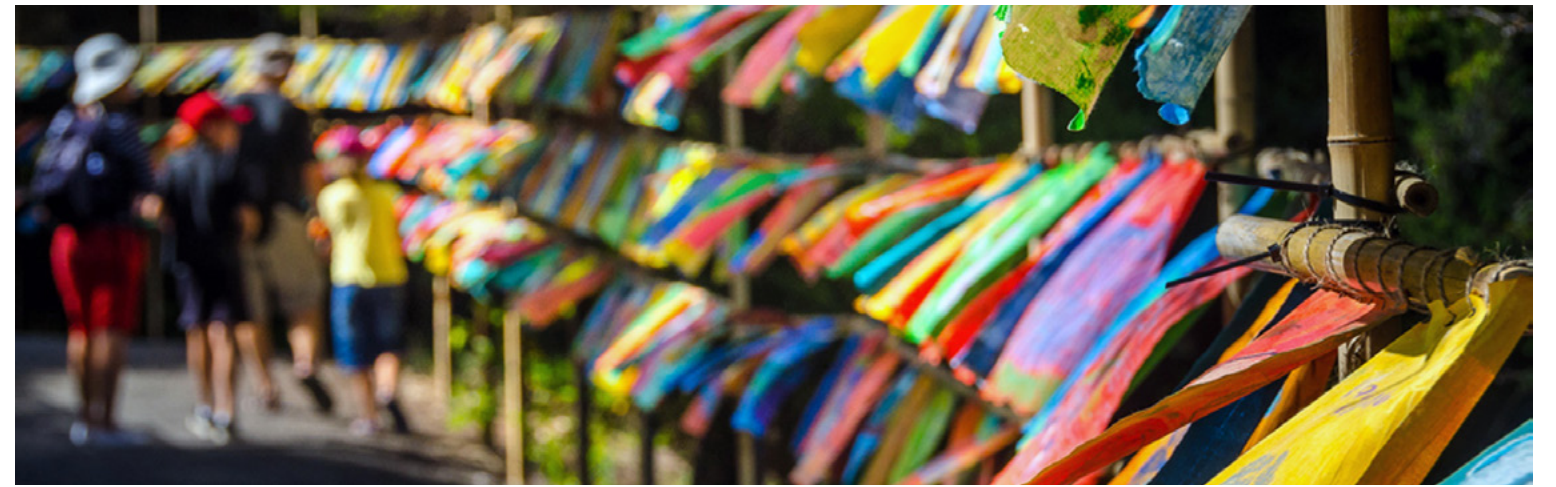
Brings fun, hope and happiness into the lives of children living with cancer.

First Foundation

Supporting highly capable students who are held back by their socio-economic status.

We take care of the administrative, regulatory and management aspects of your charitable giving so you are free to enjoy the giving process.

Community impact is at the core of everything we do.



Community Connection

Advisors

We have strong relationships with communities, charities, causes and projects across the Auckland region as well as a deep understanding of the ever-evolving need.

We work closely with your advisors, including lawyers, wealth professionals, accountants and other offices to support your philanthropic goals and make the process smooth for you.

Distributed
in 2023

\$2.7M+

“Do it! I found the process very simple and straightforward, and my contact with the Foundation to be personal yet efficient. The team’s professionalism has left me feeling reassured and confident that my bequest will be managed effectively.”

Fund holder, Malcolm Wade’s advice for anyone thinking about setting up a fund.

Distributed
since inception

\$15.5M+

Totara Fund is a family fund supporting other families in their local community. They made the decision to move their funds to a donor advised fund within Auckland Foundation. This enabled the family to concentrate on building the fund and have it managed at minimal cost. More importantly, it relieved the effort of administration and research that is now undertaken by the team at Auckland Foundation.

“In our experience, there is an increased desire for charitable giving in New Zealand. However, not everyone always appreciates the ongoing, time-consuming and costly requirements that are essential to establishing and maintaining a successful charity in New Zealand.

Auckland Foundation creates efficiencies by taking care of the establishment and ongoing compliance, administration, investment and governance...”

**Henry Brandts-Giesen
Partner, Kensington Swan**

“Very often when engaging with clients, the topic of philanthropy comes up in conversation.

In many circumstances the clients have a goal or objective that involves philanthropic endeavours but they are uncertain where to start... we have been dealing with Auckland Foundation for a number of years and continue to introduce our clients to them, whether it is for educational purposes (or) assistance in establishing their own fund...”

**Daniel Ryan
Regional Manager - Auckland
and Northland, ANZ Private**

Grants per year
distributed

220-250

Investments

DAF's are invested by Auckland Foundation with a long-term mandate consistent with endowment funds. This means that funds are invested to achieve a level of income generation to support long-term grant making during all market conditions and to preserve the capital of the Fund.

Auckland Foundation's investments are governed by our SIPO which is reviewed by our Investment Advisory Committee every 3 years and adherence to it is monitored on a quarterly basis.



YOUR GIFT



**IS INVESTED
AND GROWN**



**AND THE ONGOING
INCOME EARNED**



**GOES TO THE LOCAL
CAUSES YOU LOVE**

Why Auckland Foundation?

- + **A proven global model**
- + **Simple to establish your Donor Advised Fund**
- + **Allows you to give in perpetuity**
- + **Access to independent & expert philanthropic advice**
- + **Strong community knowledge & insight**
- + **Very low administrative requirements**
- + **Maximum tax benefits**
- + **Your existing advisors can be involved**
- + **Extremely low fraud and legal risk**

Contact us today

**We make giving
easy & empowering**



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