

Auckland Foundation – Supporting Your Giving



**Auckland
Founda+ion**

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 have been a proven global philanthropic model since 1914. This model of giving was brought to New Zealand by Sir Steven Tindall over 20 years ago and Sir Steven is an Ambassador for the national community foundations network.

What is the process?

Establishing a Donor Advised Fund

Auckland Foundation works with you to establish a Donor Advised Fund (DAF) which is a charitable structure for your giving. A supplementary deed that outlines your charitable giving wishes is the legal document that explains how you want your donations to be distributed now and in perpetuity. All activity relating to your DAF are bound within the terms of your supplementary deed and it is the responsibility of Auckland Foundation to ensure these terms are upheld forever.

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.

Auckland Foundation takes care of...

Governance

Compliance

**Admin &
reporting**

Grant making

**Succession &
future activity**

So you can focus on...

**learning about
the causes
that are close
to your heart**

**deciding
what projects
you want to
support**

**We take care of the administrative, regulatory and
management aspects of your charitable giving.**

Quotes from donors:

"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."

- Malcolm Wade Fund

"The Totara Fund is a family fund who made the decision to move their funds to 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 done by Auckland Foundation."

- Totara Fund

Creating a legacy

A bequest is a wonderful way to leave a legacy and support future generations. Giving through Auckland Foundation gives you the most flexibility and choice.

There are many reasons people choose to leave a bequest. Some people have been active philanthropists during their lifetime and want to ensure their philanthropy carries on in perpetuity.

Other people have not been able to give as much as they would like during their lifetimes, so in death, after recognising their families, they leave a gift, usually a percentage their estate.

Intergenerational giving

With intergenerational wealth transfer taking place, the philanthropic conversation is more and more relevant. In New Zealand, we have a longstanding reputation of being generous so its not surprising that this wealth transfer often involves philanthropy.

Talking with loved ones and planning ahead are the most important parts of the wealth transfer process. Having a transparent conversation with family members and developing a clear plan can make all the difference. Including those close to you in the planning of your charitable giving is a wonderful way to share the joy of generosity and your family can be as involved as much or as little as they would like.

Why leave a bequest with us?

Local impact

With a gift in your will, you can give to your family AND your community. All donations made provide enduring, reliable support to local charities.

Effortless giving

It is as simple as getting in touch with us, and we will help you to add Auckland Foundation to your will. The rest is up to us.

Professionally managed

All of your funds under management with us are professionally managed with robust governance by volunteer Trustees who are appointed, not elected. Economies of scale lead to better investment returns.

Leaving a lasting legacy

Leave a legacy that will give to the causes you care about in perpetuity and continue to transform lives for generations after you've given.

Contact us today

**We make giving
easy & empowering**



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