



# GIVING SIMPLIFIED

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GIFT ACCOUNTS

# Giving, simplified

Starting on your charitable giving journey can be a lonely and difficult learning process. To make this easier, you'll want a trusted partner who understands you and your giving goals and can help connect your good fortune to people and organisations with world changing ideas.

The Gift Trust offers donor-advised Gift Accounts – a flexible, simple and tax-smart solution to help individuals, families, companies, and organisations by removing the administrative burden and maximising the effectiveness of your giving.

We can help you create more planned and thoughtful approaches to your giving to meet your charitable goals.

# Your giving, your way




“The Gift Trust takes the uncertainty out of giving. Having support with research and due diligence on donations ensures that funds are truly making the desired impact. It has been a real pleasure to work with The Gift Trust.” — Ben, Gift Trust donor

Giving is one of the most personal and meaningful things you can do in your life. Your giving tells a story - about your passions, the lessons you've learned, the good fortune you've received - to be shared with others and generations to come.

We can help you rethink when, why and how you give, making your giving simple, more effective and joyful.

Let us help tell your story!



A young child with light hair, wearing a blue hoodie and brown pants, is crouching in a field of tall green grass. The child is looking down at a small, dark, fluffy chick that they are holding gently in both hands. The background shows a vast green field under a clear sky.

Think of a Gift Account as a charitable savings account, or a simple alternative to a private foundation.

# How our Gift Accounts work...



## GIVE

When you put funds into your Gift Account you make a tax-deductible donation to The Gift Trust.

Your Gift Account can be open with an irrevocable donation starting from \$1,000 (accounts must reach \$5,000 before donations can be made).

You can also choose a name for your gift account (e.g the Smith Family Fund)



## GROW

For accounts over \$20,000, your donation can be invested in a variety of ways to grow, tax-free, while you decide which charities to support.

Larger accounts can also select a financial adviser to manage these funds.



## GRANT

Your account is donor-advised, so you provide advice on how to grant the money to your favourite New Zealand charities – now, or in the future.

We validate all organisations before we process a donation to ensure they are charitable.

These grants can be made anonymously or in your name.

# Why use a Gift account

## Quick and easy setup

Join online and make a contribution to your fund, starting from \$5,000.

## Return on investment

Premium accounts (over \$20,000) can also be invested by your trusted financial adviser for tax-free growth while you decide which charities to grant to.

## Easy admin

Choose the charity you want to support and we handle the rest. We verify charitable status, process funds, and compile an annual report on your giving.

## Tax smart

All your contributions to your Gift Account are eligible for tax credits in the year you make them. You'll only have one donation tax receipt to keep track — the one you get from us.

## Privacy

Choose whether your grants are made in your name or anonymously and reduce the amount of donation requests.

## Low fees

Our fees range from 1- 2% of your balance per year, depending on your needs. No set up fees.

## Flexible and personal

We support to help guide you in developing a personal, family or business giving plan. We're open to hearing what you want to achieve, and can tailor a service to fit your needs.

## National + International reach

Whether you want to give locally, nationally or internationally\*, our team can provide expert philanthropic advice, research and insight on the charities of your choice.

\* some restrictions apply



Kaibosh Food Rescue - Donation recipient



Tironui Music Trust - Donation recipient

“The administration and ongoing compliance involved in setting up a private foundation can be onerous, and risky. The Gift Trust looks after those requirements, so the donor can focus on what they really want to do with their gifts.”

– Susan Barker, Lawyer and Charity Specialist

“We’ve set up a new \$1 million fund through The Gift Trust. This new gift will enable us to deepen support for nonprofits and social enterprises based in New Zealand.”

– Matthew Monahan, Namaste Foundation

# Ready to get started?

The Gift Trust's small, dynamic team provides you with a tailored and personal service.

Get in touch today to start a conversation about how we can become your trusted partner who understands your giving goals.



## Contact us



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