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# EQUITY TRUSTEES RELEASES REPORT ON \$87 MILLION OF GIVING

## AUSTRALIA'S LEADING SPECIALIST TRUSTEE COMPANY RELEASES FIRST ANNUAL GIVING REVIEW

- \$87 million total grants and bequests in financial year 2018
- \$76 million total grants from charitable trusts; \$11 million in bequests
- More than 3,000 grants made
- 190 grants over \$100,000 to not for profits and charities
- Largest discretionary grant - \$1.5 million

Leading trustee provider of philanthropic funding, Equity Trustees, today released a much-anticipated report containing analysis of \$87 million of philanthropic granting and bequests overseen by the Company in the 2018 financial year.

"For generations Australians have been creating and leaving philanthropic legacies that Equity Trustees has had the privilege and honour of stewarding through changing times." said the Hon Jeffrey Kennett AC, Chairman, Equity Trustees.

"Many, through their generosity are 'living forever', assisting people and institutions of their choosing. This report shares the stories of many philanthropists, past and present, and highlights the impact their perpetual giving has achieved and continues to achieve. I am full of admiration for the many people and for-purpose organisations who we have partnered with to unlock the value of those funds to make a real and lasting difference to our community."

"The report tells some of the most compelling stories we could find of collaboration between for-purpose organisations and funders towards achieving shared outcomes. Examples include:

- supporting the creation of out of home care funding groups who work with young people and are campaigning to increase the age limit on out of home care,
- working with key funders of Aboriginal organisations,
- catalysing start-up social enterprises supporting solutions for ageing Australians,
- empowering grass roots climate action project funding,
- medical research, and so much more."

The Annual Giving Review sets out, with detail rarely shared, how Equity Trustees continues to evolve its giving, and the journey it is taking towards mapping, measuring and communicating how it is deepening impact through philanthropic funding. It sets out a blueprint for how Equity Trustees measures impact in the company's four key focus areas:

1. Children and young people
2. Ageing and aged care
3. Medical research and health
4. Animals and environment

Managing Director, Mick O'Brien, said: "Equity Trustees has the remarkable privilege of being a company with a purpose through the generosity of our clients, to create positive social change.



“We have an incredibly dedicated, experienced team of philanthropy professionals who, every day, manage more than 650 charitable trusts, make thousands of granting decisions, and help hundreds of people make philanthropy a core part of their life.

“We are proud of the impact we are making in the community through delivering on our responsibility as a leading provider of charitable funds in Australia, and through our partnerships with the for-purpose sector. Philanthropy is one of our key strengths and is fundamental to Equity Trustees’ ability to deliver on one of our four strategic targets for the overall company – to deepen community impact,” he said.

The report can be viewed at [www.eqt.com.au/givingreview](http://www.eqt.com.au/givingreview)

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Equity Trustees was established in 1888 for the purpose of providing independent and impartial Trustee and Executor services to help families throughout Australia protect their wealth. As Australia’s leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services and Responsible Entity (RE) services for external Fund Managers. Philanthropy services are provided by Equity Trustees Limited (ABN 46 004 031 298, AFSL 240975) and Equity Trustee Wealth Services Limited (ABN 33 006 132 332, AFSL 234528), both companies are part of EQT Holdings Limited (ABN 22 607 797 615), a public company listed on the Australian Securities Exchange (ASX: EQT)