

# EQUITY TRUSTEES CHARITABLE FOUNDATION

The Equity Trustees Charitable Foundation is the simple, effective way to leave an enduring legacy without the responsibilities of maintaining a trust yourself.

Contributing to a community or cause you are passionate about is a rewarding experience. At Equity Trustees, we can help you maximise the benefits of your philanthropic donation to a sustainable, tax-effective charitable trust.

The Equity Trustees Charitable Foundation allows donors to set the direction of their charitable giving.

When you establish an Equity Trustees Charitable Foundation account, Equity Trustees will manage the investment, governance and administration of your account. You notify Equity Trustees which organisations or projects you wish to support with the income generated from your account.

## GRANT SERVICE

In addition to managing the investment, governance and administration of your trust, premium account holders can take advantage of Equity Trustees' knowledge, experience and key networks in the philanthropic sector. This service may include:

- Assistance in developing your long term charitable vision
- Articulating your granting vision and strategy
- Researching organisations that suit your granting strategy
- Reviewing, assessing and reporting on the impact and outcomes of your grants

## EQUITY TRUSTEES CHARITABLE FOUNDATION – FOCUS ON GIVING

### LEGAL STRUCTURE

The Equity Trustees Charitable Foundation is a Public Ancillary Fund. As a donor, you establish your own account within the Equity Trustees Charitable Foundation.

### TRUSTEES

Equity Trustees is sole trustee and is responsible for all aspects of the trust including investment management, governance and granting.

### ESTABLISHING YOUR ACCOUNT

An Equity Trustees Charitable Foundation account is quick and simple to establish. The minimum establishment amount is \$20,000. You can name your account, within certain Australian Taxation Office guidelines.

### CHOOSING BENEFICIARIES

All beneficiaries must be eligible Australian charities with Deductible Gift Recipient status.

## MAKING GRANTS

Equity Trustees will advise the amount available for you to grant each year based on investment performance and minimum distribution requirements. Equity Trustees will issue grants on your behalf. Grants can be made in your account's name or be anonymous.

## MANAGING YOUR ACCOUNT

You will have a dedicated Equity Trustees client manager to provide you with information and support.

## INVOLVING FAMILY MEMBERS

You can involve family members as grant-making advisors, making recommendations to the trustee. In this role they have no legal responsibility or liability.

## GROWING YOUR ACCOUNT

There are no restrictions on the frequency of subsequent donations to your Equity Trustees Charitable Foundation account. You can also direct a bequest to your account in your Will. Your account can receive donations from the public.

## INVESTMENT STRATEGIES

Equity Trustees is a specialist manager of charitable portfolios and as a trustee has a fiduciary duty to the trust. We adhere to the 'prudent person' principle when investing charitable funds.

## TAX ADVANTAGES

You can claim a tax deduction for your initial and subsequent donations. You can choose to allocate each deduction over five years.

## A LEGACY OF GIVING

An Equity Trustees Charitable Foundation account is perpetual creating a legacy of giving.

# EQUITY TRUSTEES – EXPERTS IN PHILANTHROPY

As a specialist in end-to-end services for charitable foundations, we take the effort out of creating, administering and operating a charitable foundation, offering expert investment and granting advice and maximising the community and social benefits of your philanthropic donation.

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. Since then we have helped manage charitable trusts on behalf of individuals, families, businesses and not-for-profit organisations.

## KNOWLEDGE AND NETWORKS

Our experienced team has a unique knowledge and understanding of the not-for-profit sector, overseeing millions of dollars in charitable distributions every year.

## IN-HOUSE INVESTMENT EXPERTISE

Our investment strategy seeks to maximise the income generated for distribution, while at the same time growing capital over the long term.

## WE LISTEN TO YOU

We work closely with you to understand your motivations for giving and to identify the most appropriate charitable structure to achieve your goals.

## WANT TO MAKE A DIFFERENCE?

We welcome the opportunity to discuss how we can help you realise your philanthropic goals.

To arrange an introductory conversation, simply contact Equity Trustees on 1300 133 472 or email [charities@eqt.com.au](mailto:charities@eqt.com.au).

**1300 133 472**  
**eqt.com.au**

Philanthropy services are provided by Equity Trustees Limited (ABN 46 004 031 298) AFSL 240975 and Equity Trustees Wealth Services Limited (ABN 33 006 132 332) AFSL 234528 are part of the EQT Holdings Limited (ABN 22 607 797 615) group of companies, listed on the Australian Securities Exchange (ASX:EQT). This communication is intended as a source of information only. No reader should act on any matter without first obtaining professional advice which takes into account an individual's specific objectives, financial situation and needs. Copyright © 2018 Equity Trustees, All rights reserved. This guide was produced 02.08.2018.