



YOU CAN MAKE A DIFFERENCE.
AND TOGETHER WE'LL
CREATE CHANGE.

WORKING WITH NEW ZEALANDERS FOR ALMOST 100 YEARS.

Perpetual Guardian manages the largest number of charitable trusts in New Zealand, some of which have been helping Kiwis for 100 years. The Perpetual Guardian Foundation is uniquely positioned to use that experience to design effective grant-making programmes.

The Foundation is a unique offering. Our innovative structure creates a single access point for everyday philanthropists to engage with a range of giving options for meaningful philanthropy. That structure also helps us minimise fees and maximise impact – demonstrating our commitment to value.

We're in it for the long haul, and we're in it for New Zealand.

YOUR HELP IS A BIG DEAL.

The Perpetual Guardian Foundation takes every contribution seriously.

We acknowledge that individuals who choose to donate their own money to a 'fund for change' are trusting us to make a difference on their behalf in confronting the challenges facing our communities.

Our structure embraces many levels of philanthropy. We respectfully manage significant donations made by those who wish to focus on a specific issue close to their heart. And we also support the 'everyday philanthropist' through either our Foundation or existing Legacy Funds, where they will benefit from joining a community of donors who combine funds to achieve greater impact than what is possible through personal giving.

IN THE RIGHT HANDS SINGLE FIBRES
FROM THE HUMBLE FLAX LEAF CAN
BE WOVEN INTO OBJECTS OF
GREAT STRENGTH AND BEAUTY



STRATEGIC GIVING.

Effective philanthropy is about being part of the solution and helping to create sustainable change.

Our substantial grant-making experience allows Perpetual Guardian to apply a unique depth of knowledge and experience to ensure contributions are effective.

Increasingly, we are utilising the tools of "venture philanthropy" where larger grants and long term engagement with charitable trusts can have more significant impact on a specific cause.

We will evaluate the success of grants by tracking outcomes, learning and emerging practice. We believe in a culture of reflective practice and continuous improvement.

The goal of this strategic approach to grant-making is to ensure our community of donors is achieving maximum impact in the community.

JOIN US AND BECOME AN
'EVERYDAY PHILANTHROPIST.'

SPEAK TO OUR TEAM TODAY!

Phone: 0800 737 738
Email: philanthropy@pgtrust.co.nz
www.perpetualguardian.co.nz

 perpetual guardian

Redefining Our Philanthropy

THE FOUNDATION IS A UNIQUE
OFFERING IN NEW ZEALAND.

YOU CAN MAKE A DIFFERENCE. AND TOGETHER WE'LL CREATE CHANGE.

YOU CAN INFLUENCE REAL CHANGE.

As Max Lucado said, "No one can do everything, but everyone can do something."

Whether a donation is a significant sum, or a smaller (but no less meaningful) slice of the pie, it is managed with the same diligence.

We are building a community of donors, where the full range of investments is applied strategically to achieve the same objective - meaningful, impact focused philanthropy.

The "everyday philanthropist", who contributes modestly to The Foundation can trust that their efforts are combined with the efforts of like-minded people to create a larger fund for change.

Just deciding to support social impact is an important step towards making a difference. When contributing through The Foundation, you can be sure your investment will have a measurable impact in Aotearoa.

WE BELIEVE THAT PHILANTHROPY SHOULD BE DRIVEN BY A DESIRE TO ACHIEVE IMPACT.

HOW WE'RE REDEFINING THE TRUSTEE MODEL OF PHILANTHROPY.

The Foundation's giving and giving practices are impact focused. We seek to support social innovation, build effective organisations and contribute to change at the system or 'root cause' level.

The Foundation model enables creation of Legacy Funds in your specific area of interest, that others can then contribute and magnify impact. The structure enables lower fees and stronger value - meaning more can reach the community for greater social impact.

At Perpetual Guardian, because we manage New Zealand's largest range of charitable trusts, we can offer a single point of resource for everything related to charitable giving.

Services such as expert advice, grant management, evaluation, administration, tax management and prudent investment of funds for perpetuity are all secured within the structure of The Foundation.

The Perpetual Guardian Foundation was specifically created for all New Zealanders who want to give in a focused way.

Join us in the next generation of philanthropy.

MEASURING IMPACT.

Perpetual Guardian administers over 550 charitable trusts. Our team is committed to honouring every one of those legacies. During 2016 we granted in excess of \$27 million in New Zealand, on behalf of the generous legacies of our clients.

A CASE STUDY IN GIVING

In 1969, Rose Hellaby, a descendant of the Auckland meat dynasty, established her Māori Education Fund with the goal of creating educational opportunity for young Māori.

Rose was motivated by the staff at her family's factory, among whom she observed lost opportunities for higher education. Since its inception, the Fund has made a difference by awarding \$3.92 million to 5,381 Maori students in the areas of medicine, mathematics, science, engineering and technology.

A 2016 postgraduate recipient Mahonri Owen is developing a brain-controlled prosthetic hand. The Fund is administered by Perpetual Guardian and is a partnership with the Māori Education Trust.

HOW DO YOU GET INVOLVED?

Talk to us. When we understand which causes are important to you, we can assist you to develop a plan that matches your values and goals.

We offer a range of options for impactful philanthropy;

- **The Foundation Fund**
– A permanent charitable resource tackling some of the most intractable issues facing New Zealand.
- **Existing Legacy Fund**
– Join a community of donors to maximise impact on a specific issue, e.g. the Environmental Fund
- **Create your own Legacy Fund**
– A fund dedicated to your preferred cause, that others can then contribute to.
- **Establish an individual charitable trust**
– A stand alone Legacy Fund which fulfils your wishes for making a difference in your particular area of interest.

For more information about impact-focused giving, talk to us today.



Redefining Our Philanthropy

TELL US TODAY WHAT YOU WANT FOR NEW ZEALAND TOMORROW.
WE CAN HELP YOU DEVELOP A PLAN TO MATCH YOUR VALUES AND GOALS.

TALK TO OUR TEAM TODAY!

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