

Legacies

We have the experience and expertise to create the best long-term strategy to ensure your philanthropic vision becomes a reality.

We put in place legal and administrative structures, as well as an investment management strategy, to optimise and secure your contribution. We have cultivated an unrivalled presence in the charitable sector for ensuring seamless and transparent transfers of grants and distribution to charitable causes.

We establish, secure and manage a myriad of Charitable Trusts. With more than 130 years of heritage, we really are the trustee to fulfil your philanthropic goals.

Perpetual Guardian Foundation

We believe in giving back and helping others do the same. In 2015, we launched the Perpetual Guardian Foundation, a charitable entity designed to make giving simple for everyone. Whether you want to feed the hungry, educate children, protect our environment, revitalise the neighbourhood, or support any cause close to your heart, we can help. To keep things simple, we offer several giving options, from \$5 donations to establishing your own fund.

Over the years, we've helped thousands of Kiwis protect their assets.

Ask us how we can protect yours.

Personal Client Services

Planning for your future has never been easier.

Be smart ~ speak to us today.

Visit our website
www.perpetualguardian.co.nz

Call us on
0800 737 738

Perpetual Guardian's foundations are built on more than 130 years of ensuring the wellbeing of New Zealanders, their families and their businesses.

Estate planning

We all work hard to accumulate wealth and security for our families. It's important to know that everything you have strived to achieve is there for your family in the years to come.

We work with you to:

- Understand what you value most and devise a strategy to honour this;
- Assist you in the preparation of a Will and Enduring Powers of Attorney;
- Provide specialist advice on the establishment of Trusts; and,
- Support the ongoing administration of your Trust with asset management, tax and legal expertise.

Wills

We are experts in preparing plain English Wills that will give clear instructions for the distribution of your assets. An up-to-date, well-drafted Will avoids uncertainty, delay and cost for your loved ones.

You should have a Will to:

- Ensure that your hard-earned assets go to whom you choose;
- Make sure all your last wishes are understood, e.g. burial wishes; and,
- Appoint a guardian for your children.

WILLplus

Our WILLplus service offers you affordable and secure online storage for your Will and other important documents. In addition, you will receive an annual Will review and bereavement support for your loved ones. For a small fee, WILLplus makes it easy for you to have the right protection in place.

Enduring Powers of Attorney (EPA)

Typically prepared at the same time as a Will, an EPA helps protect against unforeseen circumstances by allowing an individual or organisation - referred to as an 'attorney' - to act on your behalf if necessary.

Such instances could be:

- If you're overseas and need someone to buy, sell, or manage assets or investment funds on your behalf; or,
- If you have a debilitating illness or injury which

prevents you from being able to act for yourself, e.g. being in a coma or becoming mentally incapable of managing your affairs.

Without an EPA in place, it falls to your family to apply to the Court for an order to appoint a property or welfare manager - a process which can be long, arduous and expensive.

Trusts

Trusts come in many shapes and sizes. They are an invaluable and efficient structure to separate and protect your assets.

A Trust can:

- Protect assets from undesirable beneficiaries;
- Protect your lifestyle from the risks associated with business;
- Provide for your dependents;
- Ensure continuity of family ownership;
- Protect assets you would otherwise bring into a marriage or relationship;
- Provide long-term support for charity; and,
- Limits claims being made against assets after death.

We can advise and establish a structure which best suits you and your unique needs. Our experts can also review your existing Trust to make sure that it stands up to any scrutiny and the test of time.