

GIVING

to make a difference



THE **FOUNDATION**
FOR GIVING

 perpetual guardian

*The Foundation
is a unique offering
in New Zealand.*



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 a more significant impact on a specific cause.

We evaluate the success of grants by tracking outcomes, learning and developing our processes. 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.



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 those 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 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 to 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 in perpetuity are all secured within the structure of The Foundation.

MEASURING IMPACT

Perpetual Guardian administers over 550 charitable trusts. Our team is committed to honouring every one of those legacies. In any given year, we can grant in excess of \$40 million in New Zealand, on behalf of the generous legacies of our clients.

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.

A case study in giving

Margaret Neutze immigrated to New Zealand in her early 20's. An accomplished harpist at the time, she joined the Auckland Youth Orchestra, where she played into her 50's, and remained the vice president until her passing. During this time Margaret and her husband Derek developed a deep passion for giving, frequently donating funds and her time to health and social services organisations.

Margaret had a passion for making a difference; when Margaret wrote her Will she translated that passion into action, creating the Margaret Neutze Legacy Fund, under the umbrella of the Perpetual Guardian Foundation. Margaret's husband Derek works alongside the Trustee, stewarding philanthropic funds to causes he knows Margaret would have loved, such as supporting people with dementia, or young musicians. Her generosity and legacy lives on in these philanthropic endeavours.



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 over 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.

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.

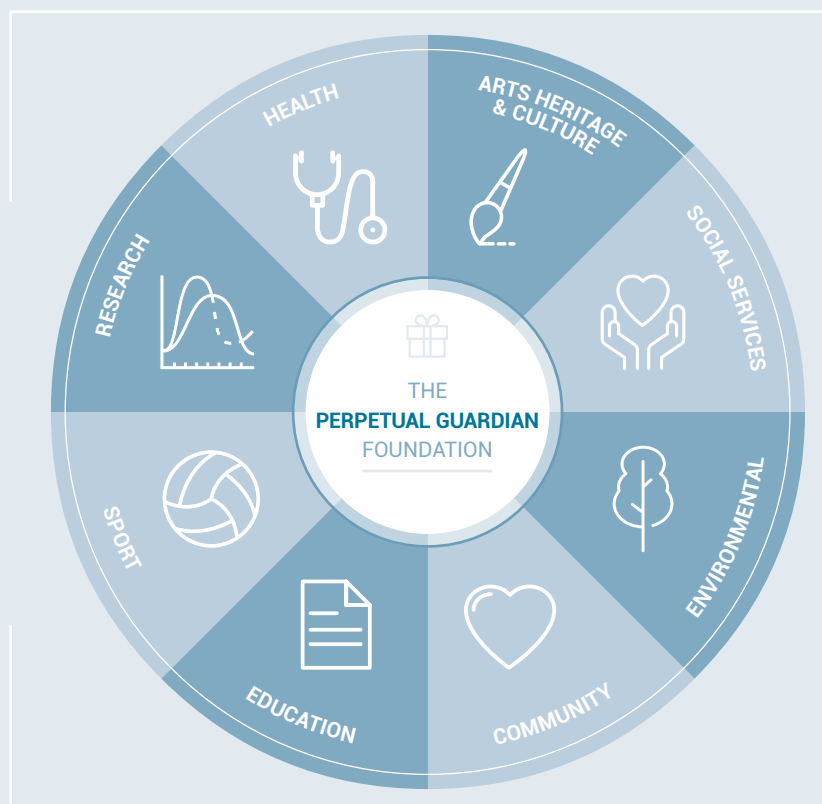
We offer a range of options for impactful philanthropy;

- **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.

Tell us today what you want for New Zealand tomorrow. We can help you develop a plan to match your values and goals.

THE FOUNDATION'S PHILANTHROPIC SECTORS



OUR CONTACT DETAILS

| | |
|-------------------------------|--|
| WHANGAREI | 110 Bank Street, Whangarei 0110, T - 09 986 5870 E - whangarei@pgtrust.co.nz |
| TAKAPUNA | 495 Lake Road, Auckland 0622, T - 09 927 9460 E - takapuna@pgtrust.co.nz |
| AUCKLAND CBD | Level 23, 191 Queen Street, Auckland 1010, T - 09 927 9400 E - auckland@pgtrust.co.nz |
| REMUERA | 343 Remuera Road, Auckland 1050, T - 09 927 9450 E - remuera@pgtrust.co.nz |
| TAURANGA | 61 Willow Street, Tauranga 3110, T - 07 928 5450 E - tauranga@pgtrust.co.nz |
| HAMILTON | 65 Bryce Street, Hamilton 3204, T - 07 959 3570 E - hamilton@pgtrust.co.nz |
| ROTORUA | 1130 Pukaki Street, Rotorua 3010, T - 07 921 7680 E - rotorua@pgtrust.co.nz |
| NAPIER | 136 Hastings Street, Napier 4110, T - 06 974 1150 E - napier@pgtrust.co.nz |
| PALMERSTON NORTH | L1, 209 Broadway Ave, Palmerston North 4410, T - 06 953 6130 E - palmerstonnorth@pgtrust.co.nz |
| NEW PLYMOUTH | 20-22 Currie Street, New Plymouth 4310, T - 06 968 8580 E - newplymouth@pgtrust.co.nz |
| WELLINGTON | Level 2, 99 Customhouse Quay, Wellington 6011, T - 04 901 5400 E - wellington@pgtrust.co.nz |
| NELSON | 15 Buxton Square, Nelson 7010, T - 03 989 2900 E - nelson@pgtrust.co.nz |
| CHRISTCHURCH | 329 Durham Street North, Christchurch 8013, T - 03 966 5800 E - christchurch@pgtrust.co.nz |
| ASHBURTON | 326 Burnett Street, Ashburton 7700, T - 03 307 6760 E - ashburton@pgtrust.co.nz |
| QUEENSTOWN | 26 Hawthorne Drive, Frankton 9349, T - 03 441 4820 E - queenstown@pgtrust.co.nz |
| TIMARU | 2 Sefton Street East, Timaru 7910, T - 03 684 2430 E - timaru@pgtrust.co.nz |
| DUNEDIN | 83A Princes Street, Dunedin 9016, T - 03 955 3770 E - dunedin@pgtrust.co.nz |

perpetualguardian.co.nz
0800 737 738