

Helping Your Clients' Giving Go Further



Philanthropy in Christchurch

The benefits of working together

Ōtautahi Christchurch has a rich history of rising to challenges: from leading the world with women's suffrage, to earthquake recovery and even meeting the unexpected horrors of a terror attack.

Gifting through The Christchurch Foundation enables our city to meet issues like these with resilience, determination, and aroha. It is an investment in the future of our region, for everyone.

Introducing a unique charity model

Community Foundations like us are not about one single cause: we are about a place and its people. Through us, donors can choose which significant local projects and causes they want to invest in to help transform their community. Our smarter giving model means that invested donations go further (and forever) by enabling generosity to have ongoing impact in the Christchurch community.



A smarter way to give

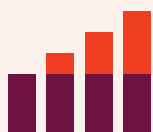
Your client's donation is invested with our portfolio so it can grow and become a long-term reliable funding stream. The income earned is distributed to local causes that your client chooses which leaves the original fund intact so it can continue to benefit Canterbury well into the future.

We use global brands both to manage our accounts and to conduct our annual audit so you can be assured of accountability.

Each donor's Fund sits in our main pool of investments, managed by professional advisors so your clients can realise the benefits of being in a larger group of funding. Prior to Covid-19 other Community Foundations typically earned 7.5% (up to 14%). The Christchurch Foundation takes 1% of the capital every year to cover the operational costs of management and distribution of the Fund.



Your gift



is invested
and grown



and the
ongoing income
earned



goes to the local
causes you love.

How to give

There are a variety of ways for your clients to give through The Christchurch Foundation. All options can be designed to help them make the most of tax benefits during their lifetime, maintain their financial security and of course look after their family first.

Your client can give to an existing Fund
There may already be a Fund set up that is working towards something your client cares about. Or they can contribute to the Christchurch Fund and leave it to The Foundation to channel support where it is needed most.

Give while they live

Gifts of significant size can become their own Named Endowment Fund. Your client can choose the name and which causes will benefit from the Fund's income. They or their descendants will also receive annual reports on earnings and distributions from the Fund.

Leave a gift in their will

When making a will many people want to give something back to their community by leaving a gift to their favourite charitable cause. It could be a percentage of the estate or a specified sum.

The Muslim Terror Attack Education Fund

After the tragic mosque terror attacks in March 2019, the Christchurch Foundation was asked to steward the donations which came flooding in.

Some of the larger gifts were tagged to what has become known as The Education Fund; a long-term legacy for the children of the deceased and those injured by bullets.

The fund currently totals just over \$1.6 million. It will support 108 children with a grant for post-school education or training and will be held in trust by us for the next 18 years.

Many thousands of large and small gifts came with messages of Aroha, "You should have been safe here, New Zealand loves you, Kia Kaha."

Edna Brown: How our investment model works

2003

The Edna Brown Endowment Fund established

Original gift
\$67,200



First established with a Fund balance of **\$67,200**

2018

after 15 years

Collective total
\$141,700



\$84,700 Fund balance + **\$57,000** grants distributed

2033*

after 30 years

Collective total
\$251,000



\$112,500 Fund balance + **\$138,500** grants distributed

*This model is based off the estimated growth rate of 7.5% (typical of other community foundations) with an annual distribution of 4%



Why have the ‘philanthropy’ conversation

Conversations about how your clients can have an impact and do good with their money are often warm and rewarding. Many people want to give and make a difference. Speaking to your clients about their altruistic interests provides an opportunity for you to connect with them and to understand much more deeply their core aspirations and values.

The Christchurch Foundation can add significant value to your client relationships by offering professional philanthropic expertise to complement your existing skill sets. We can help you provide a more holistic financial planning approach.

How we can work with you

We work in partnership with you. Be it in the background supporting you to lead the conversation with your clients about developing a philanthropic plan or offering the advice directly.

As your philanthropy services partner we can:

- › Build a tailored giving strategy for your client
- › Connect people with local programmes or charities doing good in their community
- › Accommodate gifts such as real estate, life insurance policies or shares even when they are not easily transferable
- › Manage investments and distribute income
- › Offer guidance on including philanthropy in wealth planning conversations

“Knowing the difference in types of giving can be a real ‘eye opener’ for clients. Most are delighted to discover more strategic ways beyond traditional charitable giving.”

Bill Holland, Law Partner

We work in partnership with you. Whether it is supporting you or dealing directly with your clients, we will always respect and work within the relationships you have established.

Thank you for your part in helping transform local communities.

christchurchfoundation.org.nz





Find out more



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**THE
CHRISTCHURCH
FOUNDATION**