

ANZ Trustees Foundation

The ANZ Trustees 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 ANZ Trustees, we can help you maximize the benefits of your philanthropic donation to a sustainable, tax-effective charitable trust.

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

Under the ANZ Trustees Foundation you can utilise ANZ Trustees expertise in one of two ways:

Personal Account:

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

Premium Account:

In addition to managing the investment, governance and administration of your trust, premium account holders can take advantage of ANZ 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.

ANZ Trustees Foundation – focus on giving

Legal structure: The ANZ Trustees Foundation (ATF) is a Public Ancillary Fund. As a donor, you establish your own account within the ANZ Trustees Foundation.

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

Establishing your account: An ANZ Trustees Foundation account is quick and simple to establish. The minimum establishment amount is \$50,000. 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: You are encouraged to distribute between 85% and 100% of the total net income earned from the account each year. The minimum individual grant distribution is \$1,000. ANZ 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 ANZ 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 ANZ Trustees Foundation account. You can also direct a bequest to your account in your will. Your account can receive donations from the public.

Investment strategies: ANZ Trustees is a specialist manager of charitable portfolios and as a trustee has a fiduciary duty to the trust. ANZ Trustees adheres 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 ANZ Trustees Foundation account is perpetual so it allows you to create a legacy of giving.

ANZ Trustees – experts in philanthropy

As a specialist in end-to-end services for charitable foundations, ANZ Trustees takes 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.

We have over 130 years' experience in managing 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.

Your opportunity to make a difference

We welcome the opportunity to further discuss how ANZ Trustees can help you realise your philanthropic goals. To arrange an introductory conversation, please contact ANZ Trustees on 1800 011 047 or email trustees@anz.com. We look forward to helping you realise your vision.