Why Kiwis love to give



Leaving a lasting legacy through a gift in your will

charities that you care deeply about – they could involve furthering the aspirations of youth, protecting the local environment, nurturing arts and culture or contributing thoughtfully to solutions to growing welfare and social issues.

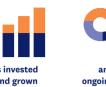
And, while you will also be familiar with the concept of traditional charity giving, you may not be so familiar with the idea of giving for the long-term – investing your gift to benefit your beloved cause of choice, forever.

Community Foundations provide a structure for generous people to give back for the long-term. They offer a smarter giving model which enables anyone's generosity to have a lasting impact in the community that they love.

The invested endowment model of giving is particularly smart as it provides a long-term sustainable income stream for local charities, which will be increasingly important in a COVID-19 world, as we see funding resources being stretched like never before.

How does it work?







September is Wills Month and if you would like to effect lasting change in your local community, perhaps through a gift in your will, consider what you love the most. Then check out how the notfor-profit, invested endowment model works at www.communityfoundations.org.nz, a smart

As recent months have shown us, the generosity of Kiwis shines through – "Naku te rourou nau te rourou ka ora ai te iwi - with your basket and my basket the people will thrive".

and fulfilling way to leave a lasting legacy in the

community that you love, building resilience for the

Eleanor Cater

EXECUTIVE DIRECTOR COMMUNITY FOUNDATIONS OF **NEW ZEALAND**

Make your giving go further at www.communityfoundations.org.nz

Kiwi generosity – it's in our DNA

ne of the many aspects of Kiwi life we can be proud of is our generosity. The Global Giving Index places New Zealand third in the world for our volunteering, donating, and willingness to help a stranger.

While we're a generous bunch, we need to step it up! Aotearoa has some serious issues and there are many people needing additional support from not-for-profits.

We face harmful climate change, too many children live in poverty, we have shockingly high family violence rates, and people of different genders, ethnicities, sexual orientation and abilities experience discrimination.

Our generosity can take many forms, and a powerful one is giving money. Whatever your area of passion, there will be a charity working hard in that space. Your money will help them do more

There are many ways you can donate to your chosen cause/s. Options include payroll giving, one-off or regular donations direct to charities, or using knowledgeable intermediaries.

One of the fastest growing generosity intermediaries is the international Community Foundations movement. They harness the generosity of a region, invest gifts and ensure donations make a real difference in your back-yard.

Community Foundations across New Zealand work with generous people who want to support their local community, and in particular during September Wills Month promote the idea of leaving a gift to your community in your will. We support this campaign, as gifts in wills can be transformational in terms of what charities can

We encourage New Zealanders to take time in September to think about what legacy they'd like to leave to their community. Whether big or small leaving a bequest to a charity close to your heart will make a difference.



Sue McCabe

CHIEF EXECUTIVE. PHILANTHROPY **NEW ZEALAND**

Growing effective giving www.philanthropy.org.nz

New Zealand's generosity in the spotlight

ocal giving has always been important and with September being Wills Month it's a timely reminder look communities. COVID-19 has affected our communities and while the government is

During COVID-19 we are seeing so many examples of Kiwis helping each other in their when others need a hand. We are a generous

Community Foundations are a great way to support the people and causes in your local community that matter to you. We

milies for future generations. Through The Tindall Foundation, I've personally

Community Foundations in New Zealand are now really beginning to take off across of your giving, and your local Community or leave a gift in your will with instructions

It really is an investment in the future of your community. I encourage you to get in touch with your local Community Foundation to

Stephen Tindall

BUSINESSMAN, PHILANTHROPIST AND PROUD SUPPORTER OF GROWING GENEROSITY ACROSS AOTEAROA NEW ZEALAND

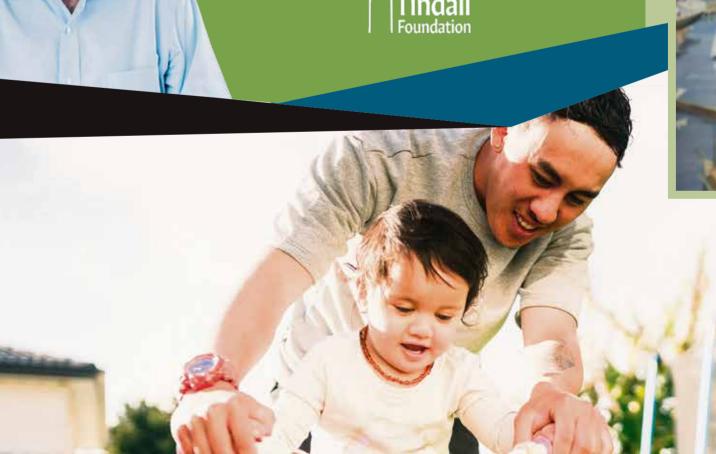
of New Zealand addresses the issue of funding by investing gifts from donors and securing steady income streams for charities. Leaving a gift in a will to a Community Foundation is a great way to make a difference to the future social, economic, cultural and environmental wellbeing of our communities. I hope more New Zealanders will take up that opportunity to help bring about positive change.

Community Foundations

The Rt Hon Dame Patsy Reddy, GNZM, QSO

GOVERNOR-GENERAL OF NEW ZEAL AND





GISBORNE - A belief in giving back

aureen Potroz says it was the support of two generous people early in her life that fostered her belief of giving back. Maureen grew up in Dunedin where she began her life-long love of music and performance. She left the South Island in her twenties and lived in many different places in the North Island before moving to Gisborne where she settled down.

It was during the early years that Maureen met two music teachers who recognised her talent and nurtured it, providing free training when she couldn't afford it. Their generosity and kindness had a big influence on the young woman, teaching her invaluable skills as a singer and performer which led to opportunities in music and theatre and enabled everything she achieved in music over her life – including offers of a scholarship in England and a part on TV back in her heyday. They also taught her the value of giving and she has been giving back ever since.

Maureen gave back to the community, just as her early benefactors did, by training young local musicians (whether they could afford it or not), volunteering for thirty years as an official accompanist at Gisborne music competitions and

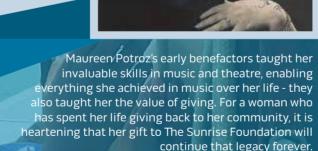
as the founding member of Centre Stage, a charitable organisation that has supported operatic and musical theatre in Gisborne since 1986.

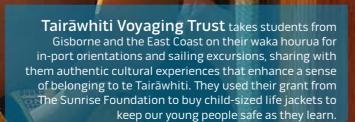
When Maureen visited her lawyer to make arrangements for her will, after providing for loved ones, she talked to her lawyer about leaving something for the community. When he mentioned The Sunrise Foundation to her, she loved the idea that a donation to her local community foundation would keep on giving back to her community

She said "it was really easy to set up" and decided to donate to the General Fund "because she wanted her donation to help anyone who needed it."

For a woman who spent her life giving back to her community, it is heartening that her gift to The Sunrise Foundation will continue that legacy forever.







Maureen's legacy

Maureen Potroz donated her gift in her will to the General Fund at The Sunrise Foundation

because she wanted her donation to help anyone who needed it.



Pākirikiri Marae, Tokomaru Bay, north of Gisborne, received a grant from Sunrise's General Fund which helped them train young people in land conservation. Students gained new knowledge and skills to conserve land as well as gaining Level 2 NCEA credits.



Te Hapori Trust supports adults with significant intellectu disabilities to live great lives. Recognising that whanau also need a break, their programmes support whanau by allowing them time to work, pursue hobbies and generally recharge. They used their grant from Sunrise's General Fund to establish a sensory room for intellectually disabled adults in Gisborne

A grant from Sunrise's General Fund helped the **Mangapapa Church Foodbank** assist agencies such as



Sorting out your will is a task that is all too easy to put off, but things could get messy for those you leave behind if you die without a valid, up-to-date will.

Having a will gives you comfort of mind that you have made the best provision possible for the people and causes you care about, making it easier on your family and friends if the worst should happen.

Sunrise is a simple and lasting way to support charities and causes in Tairāwhiti-Gisborne that are important to you.

Add Sunrise to your will for free in the month of September with our partner law firms Rishworth, Wall & Mathieson; and Woodward Chrisp.



If you would like more information contact Glenda on 06 867 7939 or glenda@sunrisefoundation.org.nz.

www.sunrisefoundation.org.nz



Gisborne's Riding for the Disabled provides 2.800 rides and their volunteers donate over 3,000 hours of their time a year to this wonderful cause. A grant from Sunrise's General Fund helped them buy horse covers to keep their therapy horses warm, dry and healthy.



We enjoy the sense of contribution – but, while it helps that we receive some financial benefit in tax credits, our donations are limited to what we can afford today.

So we agreed it was time to update our wills. We spent some time considering how our estate should be distributed and, like many, our default position had been to leave everything to



y husband and I believe in 'living giving'. our family. But we don't have children and our extended family are financially independent.

> Our lives are fulfilled through our families, our work and our communities, and we wanted to recognise this by passing it forward. And through my involvement with Auckland Foundation as Executive Chair, I see the value and impact an endowment fund with our local



to benefit future generations.

PHOTO SUPPLIED BY AUCKLAND FOUNDATION

We decided to make Auckland Foundation our primary beneficiary.

Auckland Foundation's

> it easy, effective and efficient. We have no worries about how the funds are managed

My recommendation – do it! Even a small portion of your estate can make a difference to your community, and your

Jov Marslin Executive Chair, Auckland Foundation



or governed, and we have much more clarity about what is important to us and the impact we can make.

family will be proud of your generosity.

WAIKATO - A gift to the Waikato which will flow on into the future

eaving a gift in their will towards the future of the Waikato is an important priority for a couple looking to give back to the region they love to call home.

The couple, who have asked not to be named*, explain why they chose Momentum Waikato Community Foundation to realise their aspirations.

"We are a committed and loyal Waikato family who have spent our lives enjoying what our region has to offer. Our local Community Foundation is the ideal vehicle for supporting developments that celebrate our region's unique identity and add to the infrastructure that enhances life here. "We're at the age where our parents' generation is dwindling, which has given us cause to reflect. Their generation was very community-minded and they raised

us with a similar set of values. We feel this gift allows us to continue that legacy by contributing to things future generations will benefit from."

"We have jointly agreed that, via our Wills, 25 percent of our net worth will be gifted to Momentum Waikato Community Foundation. We feel absolutely enthused to be part of something that's larger than us, that will last beyond our time here, delivering joy to future generations."

A couple's love for the region is behind a significant gift for the Waikato that will be invested and live on forever.

PHOTO SUPPLIED BY MOMENTUM WAIKATO.





ROTORUA - Leaving a family legacy to benefit a beloved cause

oberta (Bobbie) Griffin loved animals. She grew up on a farm, the fourth of five girls. The girls rode horses to the local school and in the summer the family would often travel to Ngongotaha, on the shores of Lake Rotorua, where they enjoyed trout fishing.

Animals remained Bobbie's greatest passion. Over the years, she and Enid Griffin adopted numerous dogs and cats from the local SPCA. When Bobbie updated her will in 2010, she established the Roberta and Enid Griffin Fund, through Geyser Community Foundation. She decided to leave a gift in her will to be invested in the Fund for the benefit of the Rotorua SPCA.

Bobbie died in 2014 and, since then, every year the Rotorua SPCA receives a gift from the Roberta and Enid Griffin Fund managed by Geyser Community Foundation. The gift is not a capital distribution, it comes from the annual income earned from the investment of the Fund, which has already gifted over \$38,000.

Bobbie's passion for her four-legged friends will now live on forever through her local Community Foundation, leaving a family legacy to benefit her beloved cause.



Bobbie Griffin's love for animals has seen a gift left to Geyser Community Foundation to be invested and to benefit Rotorua SPCA for the long-term.

A smart and effective way to give for the long-term

he Community Foundation's unique perpetuity model is one that has always resonated with us at Craigs Investment Partners. Chair, Neil Craig, was introduced to the concept in 2003 with the launch of the Acorn Foundation in Tauranga and believes that every community should have a Foundation like this. "Craigs got right behind the concept from the very beginning when local identity Bill Holland together with Stephen Tindall, launched the Acorn Foundation in Tauranga."

Investing for perpetuity means that Community Foundations don't have to ride the short-term highs and lows of the stock market. Money is conservatively invested for the long-term, using detailed Investment Policy Statements developed by each Foundation's Investment Advisory Committee. Each Foundation then distributes a percentage of the income earned each year (usually 3.5 - 5%) to organisations in their local community, with the original capital sum remaining in the Fund.

Benefit to the community

Craigs also recommends to clients who are interested in making a difference in their local region, to look at Community Foundations of New Zealand, e.g. the Acorn Foundation's first donor of an Estate over \$1m, Colin Toop, was a Craigs client who had set up a 'fund' to honour his late wife and son. Colin died in 2006 and since then, his fund has grown from \$1.03m to \$1.27m, while also distributing nearly \$775,000 to local charities across the Western Bay of Plenty.

In the not-too-distant future. Colin's fund will have distributed more than he originally gifted, with the original capital sum safely invested for future contributions to his local community.

This example exemplifies why Craigs is such a strong supporter of Community Foundations; it is a smart and effective way to give to your community for the long-term.



organisations will need support more than ever from generous people all across the country. Designating a gift in your Will to be invested with your local Community Foundation is a simple, fulfilling and smart way to leave your mark on your hometown -

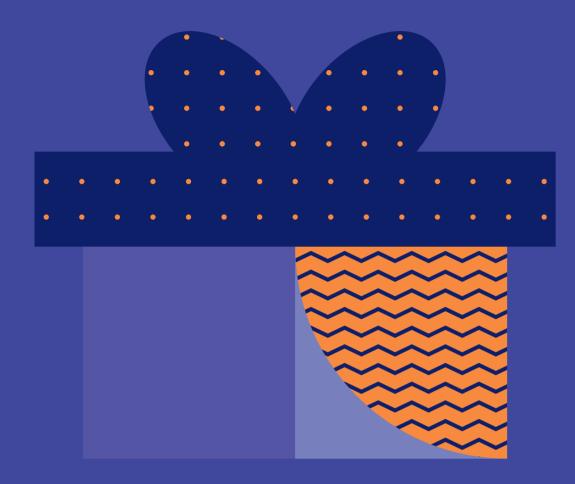
CRAIGS INVESTMENT PARTNERS



Founding Partners of Community Foundations of New Zealand

0800 272 442 / craigsip.com

Craigs Investment Partners Limited is a NZX Participant Firm. Adviser Disclosure Statements are available on request and free of charge.



Leave a lasting legacy in the community you love.

If you're considering leaving a gift in your will, ask your local Community Foundation how yours can make your community a better place for many generations to come.



A unique charity model

Community Foundations are independent, not-for-profit organisations located across the country. We're different because we're not about one single cause; we're about a place and its people. Through us you can choose which significant local projects and causes to invest in to help transform your community. And with our smarter giving model, your generosity can have benefits that last forever.

How it works

You don't have to be wealthy to have an impact. Whether it's a large or small gift, all giving makes a difference through your local Community Foundation.



and grown







goes to the local causes you love.

Connect with your local Community Foundation

Northland – Northland Community Foundation

Auckland – Auckland Foundation

Waikato – Momentum Waikato

Community Foundation

Eastern Bay of Plenty – Eastern Bay Community Foundation

Western Bay of Plenty – Acorn Foundation

Rotorua & Taupo – Geyser Community Foundation

Gisborne-Tairāwhiti – Sunrise Foundation

Taranaki - Te Karaka Foundation

Hawke's Bay - Hawke's Bay Foundation **Horizons Region** – Te Awa Community Foundation

Wellington - Nikau Foundation

Tasman, Nelson & Marlborough - Top of the South Community Foundation

Christchurch – The Christchurch Foundation

Ashburton – Advance Ashburton **Community Foundation**

South Canterbury – Aoraki Foundation

Wakatipu/Queenstown - Wakatipu

Community Foundation

Clutha District - Clutha Foundation

For more information visit communityfoundations.org.nz



Why Kiwis love to give | Encouraging generosity...strengthening communities

Top tips for leaving a charitable gift in your will

iving gifts in your will is a sensible way to ensure your legacy remains after you pass. Leaving donations or bequests this way also ensures you can fit it into your budget – these gifts are given after the debts and costs of your estate have been settled.

Endowment funds, like those offered by Community Foundations across New Zealand, ensure the support you want to give to an organisation or purpose lasts for a long time. This means your legacy lives on in the way you want it to.

When considering leaving gifts in a will, there are some key things to remember to make sure your intent for settling your estate is clearly captured.

Have a lawyer write up your will so that the intent is clearly captured, and you are well informed of your options.

Ensure you know which assets fall into part of your estate, and what assets may not.

Consider how you want to care for whānau and friends after you have gone.

Ask your lawyer what endowment funds are available to best support a cause you are passionate about or discuss the possibility of setting up your own endowment fund. Community Foundations across New Zealand can help set these up.

Manage the residue of your estate

– what is left after your debts and
costs are settled – in percentages.

This is important if the size of your estate is
different from that when you made the will.

Ensure the will you draft revokes any earlier will that you may have made.

gone.

Talk with your family about your decisions so that everyone is clear about your wishes. A clear understanding of your wishes can be the best protection for the gifts you want to make.

This information is attributed to the New Zealand Law Society | Te Kāhui Ture o Aotearoa in support of Wills Month and the work Community Foundations of New Zealand do managing bequests from wills every year. If you need a lawyer to assist in preparing your will, the Law Society website's Find a Lawyer tool can help you find one in your local area.





NORTHLAND - When giving feels good

areth Foster's entire life has been spent in Northland, and he has a number of local causes which are close to his heart

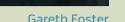
Gareth is a bass singer, and has performed for many years, including with the Whangarei Repertory Society and the Whangarei Theatre Company. He has always loved sport, particularly athletics and swimming, and he has seen the opportunities that investment in youth can bring to young talent. Gareth also has

a love for education, which his mother instilled in him as a school teacher.

In writing his will, Gareth has naturally chosen to look after family and friends first, and has decided to leave the residual of his estate to benefit these causes that mean the most to him: namely opera, sports and education.

Gareth's residual gift will be invested with Northland Community Foundation, with the income benefiting these causes of his choice forever, providing scholarships to upand-coming young talent in his name.

Gareth said, "Giving makes me feel good! It's great to give something back to the community I



have lived in and loved for my whole life."



Teru Carrington, recipient of a recent scholarship from a fund managed by Northland Community Foundation.
PHOTO SUPPLIED BY NORTHLAND COMMUNITY FOUNDATION.



Cape Reinga Lighthouse

WELLINGTON - Planning giving that will last forever

arisha (Max) Koh has always planned for her financial future. So, when it came to making her will, Max felt it was important to leave something to the causes she cared about most in her life.

Driven to give something back when she is gone, Max made the decision to gift her estate through her will to Wellington's Nikau Foundation. Her gift will be invested and will provide essential and sustainable

funding to two of the causes she cares about most - Cats Protection Wellington and Wellington Women's Refuge.

Max said, "it is a much better way to give to my causes for the long-term through Nikau Foundation, rather than giving a sum of money directly to the charities to be spent. It's a more strategic way to give, and will benefit my beloved chosen causes forever."



Max Koh



Why Kiwis love to give | Encouraging generosity...strengthening communities

OPOTIKI - Sharing success with community

ay and Lis Sharp have lived most of their lives around Opotiki in the Eastern Bay of Plenty, where they first worked in accountancy, farmed sheep and cattle and, in later years, established and managed kiwifruit orchards.

Their four children grew up around the area and they feel a sense of responsibility and care for the district where they have built their businesses, which they see as intergenerational. The family plans to continue building opportunities, employing local people and giving back to the local community for the long-term.

Ray and Lis have chosen to leave a gift in their will of 10 percent of their estate to the local community, to be invested

PLEASE

PHOTO CREDIT: JIM ROBINSON, OPOTIKI DISTRI

with Eastern Bay Community Foundation, with the income flowing back to local community causes, forever.

Ray says, "We thought about what our life was all about and that it would be a whole lot more meaningful if we could leave something to the community.

Our success has a lot more meaning and purpose if we can share our good fortune". Ray and Lis have spoken to their four children about the gift and Ray says they are behind the idea, "Our children are all on board. They think it's a great thing we are doing."













nurturing the younger generation in Te Whakatōhea

TIMARU - Giving to where the community needs it most

tacey Scott likes the idea of supporting her community and providing an example of giving and generosity for her four children. She allocates a small sum weekly to go to her own fund, the Scott Family Endowment Fund, managed by Aoraki Foundation in South Canterbury. Stacey has also made a gift in her will of 10 percent of her estate to be left to the Fund when she leaves this world.

Stacey says that she likes the idea that her contributions are invested and will be channeled to community groups who need it most. She also

gets great joy from the idea that her gifts will be invested and will continue to support her community forever.

Stacey's advice to others is to figure out what they're passionate about and focus on that. "It might be a cause that has touched you personally or is important to your family. And it doesn't have to be a lot of money either, a small percentage in your will can make a big difference. Giving through your local Community Foundation is easy and is a richly rewarding experience".



VIVIENNE LAURSEN PHOTOGRAPHY



The Aoraki Foundation South Canterbury Health Endowment Fund supported the 2019 TiMOru Soapbox Derby via a grant to support health promotion messages for Movember. PHOTO SUPPLIED BY BRADLEY POWDRELL PHOTOGRAPHY

ASHBURTON - A local legacy in safe hands

raham Gunn is a man of many talents – a horticulturist, organist, choir singer, and a dahlia enthusiast, national judge, and patron. Graham is also passionate about the Ashburton District, and says, "I was born, raised and lived all my life in Ashburton, and I feel very fortunate to have done so. It gives me great satisfaction to know that through Advance Ashburton Community Foundation, I have set in place an effective, lasting way to give something back to the community that has been so good to me."

Through a gift in his will, safeguarded by Advance Ashburton Community Foundation, Graham will be enabling scholarships to encourage, foster and support talented students in all things musical.

The remainder of the income from his gift will provide for general purposes in the Ashburton District, and will support – forever – the greatest needs in his

"You can see the positive difference Advance Ashburton is making in our community, and I feel very comfortable knowing that my legacy is in very safe

The Mid Canterbury Rural Drivers Licence programme received funding from Advance Ashburton to help support local migrants brea down a barrier to rural isolation PHOTO SUPPLIED BY ADVANCE ASHBURTO







Directory of community foundations

The Christchurch Foundation connects generous donors to projects and causes they love across greater Christchurch, to achieve their dreams for our city.







works with generous locals who want eave a lasting legacy within the wider nmunities of Kawerau, Opotiki and





The Aoraki Community Foundation works with generous locals who want to leave a lasting legacy for their community. For further information, please visit our website - aorakifoundation.co.nz or contact our Executive Officer, Leah Bradley admin@aorakifoundation.co.nz



clutha

Connecting generous people with causes that matter. Forever.

www.cluthafoundation.org.nz

Working together with generous local people to build a positive future for all in the Central Volcanic region, forever.







Leave a gift in your will to Hawke's Bay Foundation to ensure our wonderful region prospers for generations to come.

Leave a lasting legacy in the

community you love.







Your Community. Your Legacy. For Good. www.wakatipucommunityfoundation.org



Building funds to enhance our communities for future generations through the generosity of people today

What do you

care about?

www.teawafoundation.org.nz

Everlasting generosity made easy.

Inspiring generosity for a better region

www.topsouthfoundation.org.nz

Top of the South

IMUNITY FOUNDATION

We invest and protect donations and bequests so they can grow and earn income that supports our Taranaki community forever







We envisage a future where every Tāmaki Makaurau community is strong and thriving.

Auckland Foundation is proud to be supporting Wills Month. Contact us to find out how your generosity can leave a lasting legacy for generations to come.

www.aucklandfoundation.org.nz info@aucklandfoundation.org.nz

MOMENTUM WAIKATO IS PROUD TO SUPPORT **WILLS MONTH.**

We ensure a gift in your Will builds 'A Better Waikato for Everyone, Forever'.

MOMENTUM

THIS PUBLICATION WAS **DESIGNED AND PRINTED BY** The Sisborne Herald

Join us in building a stronger community together.

www.acornfoundation.org.nz **f** 07 579 9839

September is

Wills Month.

our partner law firms.

Add Acorn to your existing

Will for free this month with



07 834 0404

www.gisborneherald.co.nz

Find your local **Community Foundation**

North Island:

Northland

Northland Community Foundation www.northlandcommunityfoundation.org.nz

Auckland

Auckland Foundation www.aucklandfoundation.org.nz

Waikato

Momentum Waikato Community Foundation www.momentumwaikato.nz

Eastern Bay of Plenty

Eastern Bay Community Foundation www.easternbaycommunityfoundation.nz

Western Bay of Plenty

Acorn Foundation www.acornfoundation.org.nz

Rotorua & Taupo

Geyser Community Foundation www.geysercf.org.nz

Tairāwhiti-Gisborne

The Sunrise Foundation www.sunrisefoundation.org.nz

Taranaki

Te Karaka Foundation www.tekaraka.org.nz

Hawke's Bay

Hawke's Bay Foundation www.hawkesbayfoundation.org.nz

Horizons Region

Te Awa Community Foundation www.teawafoundation.org.nz

Wellington

Nikau Foundation www.nikaufoundation.nz

Christchurch

The Christchurch Foundation www.christchurchfoundation.org.nz

South Canterbury

Aoraki Foundation www.aorakifoundation.co.nz

Clutha District

Clutha Foundation www.cluthafoundation.org.nz/

Find out how Community Foundations are working with locals to strengthen New Zealand communities at



www.communityfoundations.org.nz

South Island:

Tasman, Nelson & Marlborough

Top of the South Community Foundation www.topsouthfoundation.org.nz

Ashburton

Advance Ashburton Community Foundation www.advanceashburton.org.nz

Wakatipu/Queenstown

Wakatipu Community Foundation www.wakatipucommunityfoundation.co.nz