

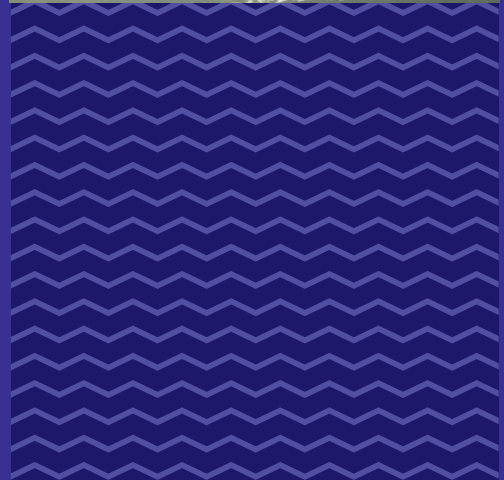
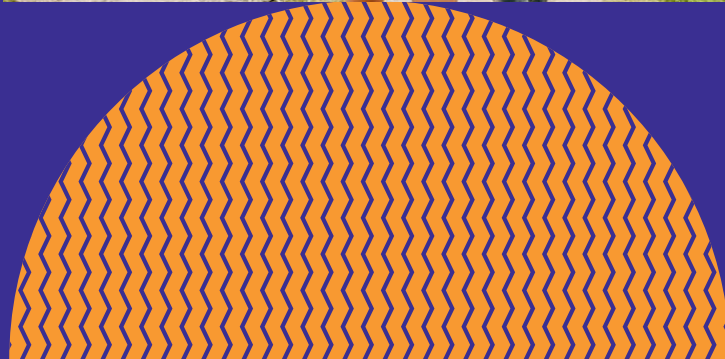
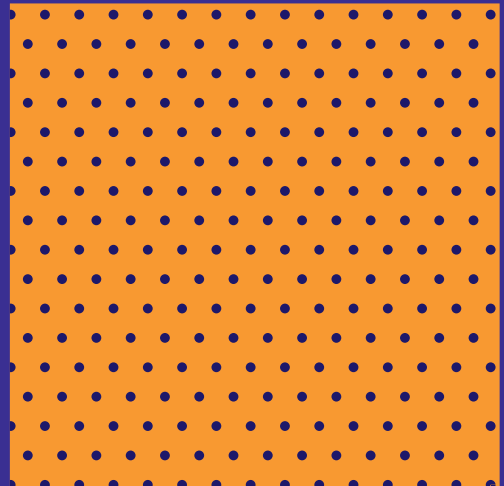
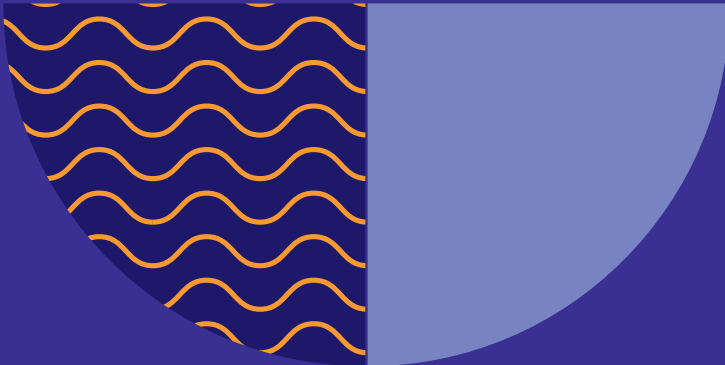
2024/25

Annual Impact Report



**Community
Foundations
of Aotearoa NZ**

Hei whakakaha i ngā
hāpori o Aotearoa



Reflections for 2024/25



It is my honour to present the 2024/25 Impact Report for Community Foundations of Aotearoa New Zealand (CFANZ). This year has been one of remarkable growth, deepening connections and transformative impact across our communities.

Our network has achieved significant milestones that strengthen the foundation for lasting generosity. We welcomed the Southland Foundation, true to our vision of ensuring every region in Aotearoa NZ now has a platform for place-based giving. This achievement, alongside our name change to reflect our commitment to Te Tiriti o Waitangi, demonstrates our dedication to authentic partnership and community-led solutions.

The numbers tell a compelling story: \$115 million granted to communities, over 700 confirmed legacy gifts and a record 152 new funds established this financial year. Behind these figures are real people making lasting change, from Edna Brown's pioneering legacy gift in Tauranga that continues giving 20 years later, to the countless volunteers contributing over 17,000 hours to strengthen their communities.

Our conference in Christchurch brought together thought leaders from across Aotearoa NZ and beyond, reinforcing the power of collective action. These connections, along with our international partnerships spanning Australia, Canada, and the UK, ensure we bring the best global practices home while remaining grounded in our local contexts.

The strategic support from The Tindall Foundation, Craigs Investment Partners, and Fonterra has been instrumental in our ability to grow awareness, enhance services, and deepen our impact. Their partnership enables us to respond effectively to community needs while building sustainable foundations for future giving.

As we align our work with the UN Sustainable Development Goals and strengthen our commitment to Te Ao Māori perspectives on generosity, we see tremendous potential ahead. Our young network is already demonstrating how community foundations can lead positive change, creating pathways for all New Zealanders to give locally and build stronger, more connected communities.

Together, we are strengthening the communities of Aotearoa NZ.

Ngā mihi nui,
Raymond Key
Chair, Community Foundations of Aotearoa New Zealand



This past year has seen strong consolidation and growth of the Community Foundations network across Aotearoa NZ. The Southland region launched their very own foundation, which is already connecting local resources with community needs. Our 18 member foundations continue to go from strength to strength, forging new partnerships and stepping into the convening role that community foundations are renowned for worldwide. This includes leading the development of new community hubs such as the Regional Theatre in Waikato and Destination Kāwaroa in New Plymouth.

As a network we are maturing, becoming more deeply community-informed. With the challenges facing our nation, and the opportunities of intergenerational wealth transfer, we know we must be more than facilitators of generosity. The exciting thing is that Kiwis want to discover how they can become the changemakers their communities need.

Our 2024 conference *Empowering Communities - Te whakamana i ngā hapori* brought our network together in Ōtautahi Christchurch alongside thought leaders from New Zealand and abroad. Together we explored how to equalise power in philanthropy and move from transactional to transformational practices.

We've also strengthened our international connections, attending the Philanthropy Australia conference in Adelaide and the Community Foundations Australia Forum in Northern Rivers. I was fortunate to join the Philanthropy Australia study tour while in the UK, ensuring our work remains connected to global best practice.

Finally, thank you to Arron Perriam, who led us from 2021–2025 through a period of strong growth. His leadership helped us look outward to international strategies and inward to the skills and knowledge we need for the future.

Community foundations are more than builders of financial assets, they are leaders of purpose and builders of community.

Hei whakakaha i ngā hapori o Aotearoa.

Ngā mihi nui,
Eleanor Cater
CEO (Acting), Community Foundations of Aotearoa New Zealand

Our board

The Community Foundations of NZ Board 2024-2025:

Board Chair	Raymond Key	Chair of Wakatipu Community Foundation
Deputy Chair	Lori Luke	CEO of Acorn Foundation, Western Bay of Plenty
	Josh Hickford	CEO of Taranaki Foundation
	Em Lewis	CEO of Nikau Foundation, Wellington
	Holly Snape	CEO of Community Waikato/Trustee of Momentum Waikato Community Foundation
	Nick Thompson (PhD)	Marketing Manager at Physiotherapy NZ

Thank you all for your leadership and dedication, ngā mihi nui.

Our supporters



“Community Foundations have a core ethos of effective funding. They understand the particular challenges our communities face and know where funding should be directed to achieve the greatest possible good”

Her Excellency, Dame Cindy Kiro, Governor General of New Zealand

Our Patron

Her Excellency, the Right Honourable Dame Cindy Kiro, GNZM, QSO, Governor-General of New Zealand, continues as our Patron. Her guiding principles of kaitiakitanga, oranga, and manaakitanga remain closely aligned with the values and purpose of Community Foundations.

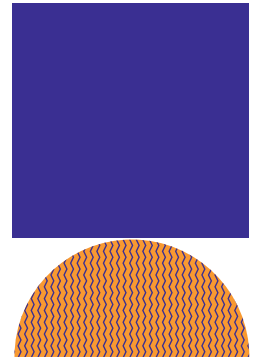
Our Ambassadors

Our sincere thanks to our national Ambassadors Neil Craig, Bill Holland, Miriama Kamo and Sir Stephen Tindall who continue to champion this mahi with generosity and vision. Each of them brings their own expertise and mana to our kaupapa and helps amplify the message of community foundations across Aotearoa NZ. Their passion for empowering local communities and their belief in philanthropy as a tool for lasting change strengthens our movement and inspires others to get involved. By sharing their time, networks and wisdom our Ambassadors remind us of the wider potential of community foundations to grow giving, foster community self-determination and enable transformative change for generations to come.

Our commitment to Te Tiriti o Waitangi

Community Foundations of Aotearoa New Zealand acknowledges Te Tiriti o Waitangi as Aotearoa's foundational document, and we commit to letting its principles guide our work. We aim to deepen our understanding of Te Ao Māori and what it means to genuinely partner with Māori in communities. CFANZ values collaboration with Māori to enhance community outcomes and strengthen generosity, recognising that learning from Māori approaches to giving fosters social cohesion and stronger communities.

Our Strategy



OUR VISION

Strengthening the communities of Aotearoa New Zealand - hei whakakaha, i ngā hāpori o Aotearoa

OUR PURPOSE

Community Foundations of Aotearoa NZ (CFANZ) is the national body for our 18 regional community foundation members.

Our collective purpose together is 'strengthening communities across Aotearoa NZ' by harnessing Kiwi generosity and enabling transformative impact.

FACILITATE CONNECTION & LEARNING

Community Foundations are more effective

- Commitment to best practice
- Training, education and skill-sharing
- On the ground support
- National standards accreditation

GROWING AWARENESS

Growing awareness & engagement

Donors / Professional Advisors / Philanthropic Sector / Government / Corporate

Building CFANZ & member sustainability & resilience

INSPIRING LEADERSHIP

Creating leaders in communities

OUR VALUES

Generosity

Respect

Impact

Innovation

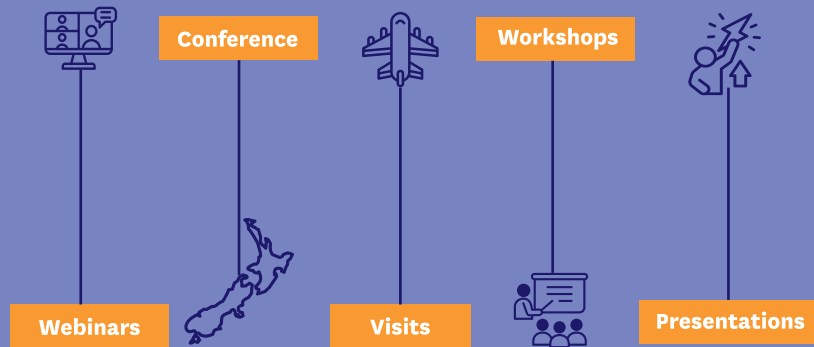
Service to members

Inclusiveness

Key activities for the year 2024- 2025

LOCAL
MEMBER
ENGAGEMENTS

60



Southland Foundation
launched

Collaborations with Global
Fund for Community
Foundations

Collaboration with US Based
Mott Foundation

Collaborations with
Community Foundations
Australia

CRM Implementation

Leading & supporting growth.

New Funds

152 2250

Grants



International Collaborations

Mott Foundation (SDG alignment)

Community Foundations Australia

Global Fund for Community Foundations

Global Giving (Global Disaster Response funding)

Legacy Futures UK

Inspire Institute, Europe

5

NZ PARTNERSHIPS

The Tindall Foundation

Craigs Investment Partners

Fonterra

Philanthropy NZ

Redseed

Compliance

- ✓ Auditor Briefing Booklet
- ✓ Independent Financial Audit (BDO)
- ✓ National standards programme progressed
- ✓ Insurance and policy development

AWARENESS & Advocacy

3 National Campaigns

135.9% **increase in**
OUTBOUND ACTIVITY

27,406

SESSIONS

Our 18-strong network growth

\$315m

invested in managed
community endowment
funds

700+

number of committed bequests for future
community endowment funds

2250 Grants

made to local communities
in the past year.

\$115m

granted to NZ
communities
over the past
10 years

Growth over one year (1 April 2024-31 March 2025)

21%

growth in
funds under
management

increase in
volunteer hours

27%

28%

increase in total
distributions to
communities

152

Record number
of new funds
established.

Part of an extended network of
regional community foundations
all sharing a deep commitment
to making Aotearoa NZ more
connected and stronger:

18

foundations

140

trustees

17,000

volunteer hours

Our members

17 PARTNERSHIPS
FOR THE GOALS

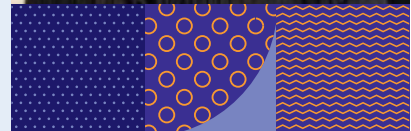


**Auckland
Foundation**



“What continues to amaze me is the strength of our network, how 18 community foundations working together can amplify local voices; sharing stories that matter and creating real impact. When we tell these stories collectively, our kaupapa reaches further to inspire not just more but better giving.”

- Ellen Miles, Brand & Marketing Lead, CFANZ



Our strategic partners



Community Foundations of Aotearoa New Zealand extends our heartfelt gratitude to our strategic partners: The Tindall Foundation, Craigs Investment Partners, The Charles Stewart Mott Foundation, Fonterra and Redseed. Your support and generous financial contributions have been instrumental in advancing our mission to strengthen communities across Aotearoa NZ.

The Tindall Foundation's commitment to growing generosity aligns perfectly with our vision, enabling us to initiate transformative projects that foster community resilience and well-being. Your partnership allows us to enhance our outreach and impact in areas that matter most.

Craigs Investment Partners has played a crucial role in our growth, providing not only financial support but also invaluable expertise in investment and financial management. Your dedication to fostering community development empowers us to make informed decisions that benefit the wider community.

Fonterra's support exemplifies a commitment to corporate social responsibility, reinforcing our collective effort to create a thriving culture of giving. Your contributions help us address pressing community needs, ensuring that we can respond effectively to the challenges faced by many New Zealanders.

The Charles Stewart Mott Foundation's funding and global remit for forwarding the 2030 sustainability agenda downunder has enabled us to partner with our community foundation network across the motu to elevate the UN Sustainable Development Goals.

Redseed is an innovative learning and development platform provider, that supports the mahi of community foundations and our commitment to best practice and continuous learning and development.

Together, we are building a stronger, more connected Aotearoa NZ, and we deeply appreciate your partnership in this vital work. Thank you for believing in our vision and for your support.



We would also like to acknowledge our key 2024 conference sponsors;



Statement of Financial Performance

Community Foundations of New Zealand Incorporated As at 31 March 2025

‘How was it funded?’ and ‘What did it cost?’

	2025	2024
Revenue		
Donations, koha, bequests and other general fundraising activities	482,496	495,495
Membership fees and subscriptions	120,419	102,519
Interest, dividends and other investment revenue	8,718	7,886
Other revenue	12,445	2,000
Total Revenue	624,078	607,900
Expenses		
Employee remuneration and other related expenses	306,085	258,306
Other expenses related to service delivery	197,759	237,470
Grants and donations made	17,391	30,870
Other expenses	121,862	104,027
Total Expenses	643,097	630,672
Surplus/(Deficit)	(19,019)	(22,772)

Statement of Financial Position

Community Foundations of New Zealand Incorporated As at 31 March 2025

‘What the entity owns?’ and ‘What the entity owes?’

	31 MAR 2025	31 MAR 2024
Assets		
Current Assets		
Cash and short-term deposits	278,862	416,399
Debtors and prepayments	-	101,178
Investments	110,740	107,141
Total Current Assets	389,602	624,717
Non-Current Assets		
Property, Plant and Equipment	363	727
Total Non-Current Assets	363	727
Total Assets	389,965	625,444
Liabilities		
Current Liabilities		
Creditors and accrued expenses	38,023	34,444
Employee costs payable	12,820	12,003
Deferred revenue	147,227	368,083
Total Current Liabilities	198,071	414,531
Total Liabilities	198,071	414,531
Net Assets	191,894	210,914
Accumulated Funds		
Accumulated surpluses or (deficits)	191,894	210,914
Total Accumulated Funds	191,894	210,914

Our national conference 2024

Empowering Communities
Te whakamana i ngā hapori

Shifting power, community agency and viewing philanthropy through an indigenous lens were just some of the powerful themes at the Community Foundations of Aotearoa NZ conference *Empowering Communities - Te whakamana i ngā hapori*, in Ōtautahi Christchurch during 21-22 October.



Barry Knight from the Global Fund for Community Foundations kicked off the conference by embracing the living vibrancy of community philanthropy, particularly with a global lens. Barry challenged Western-centric ways of thinking about 'impact' and that lifeless indicators – typically money – do not capture the crucial energy and empowerment of community and change.



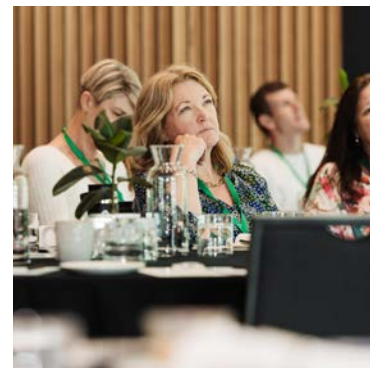
Nick Deychakiwsky (Mott Foundation) and Larry McGill (Ambit 360 Consulting) explored how the Sustainable Development Goals (SDGs) can guide and strengthen the work of community foundations. They shared global examples showing a shift toward community-led change, greater collaboration, and a stronger focus on driving meaningful social impact.



Above: Campbell Higgins (Acorn Foundation), Right: Eleanor Cater, Ellen Miles and Arron Perriam (CFANZ), Bottom Left: Maddie McLeod (Nikau Foundation) Bottom Right: Eunice Borrie (45South Community Foundation).

The vibrancy and energy radiating from community philanthropy was captured in a series of 'Innovation Sound Bites' over two days, with subjects ranging from building your brand through powerful comms, understanding the 'donor journey', Gisborne's inaugural 'Sunrise Week', corporate CSR programmes, harnessing the power of professional advisors and storytelling.

Concurrent sessions followed across day one, exploring topic-specific subjects such as shifting power in philanthropy and drawing donors closer to communities, operational sustainability, and creating a powerful community brand.





Ian Bird, CEO, Community Foundations Australia.

Ian Bird from Community Foundations Australia shared insightful perspectives of how community philanthropy has evolved across the world, including from his time as CEO at Community Foundations of Canada. Ian's challenge to Aotearoa NZ was for us to grapple with those things that are deeply problematic in our communities. There are inherent tensions of being legacy organisations that must be 'future keepers': *"As community leaders, what bold decisions might we need to make that are unpopular in the past or present?"*

The day wrapped up with Alan Wills from Geyser Community Foundation honouring the great mahi of Annette Burgess for her 15 dedicated years of growing community philanthropy across the regions of Rotorua and Taupō – *ngā mihi nui Annette, our network sure is going to miss you!*





Kōrero was rich throughout the day, including over shared kai at the conference dinner at one long extended whānau table in the unique location of The Tannery.





Day two dawned with some early breakfasts for our Chair and CEO networks and an insightful exploration of current investment markets including topics of sustainable investing with Helen Bullick from Craigs Investment Partners.

The immense energy of Kate Cherrington and Kat Dawnier from the Centre for Social Impact followed, including exploring what mana-enhancing partnerships mean for community foundations. They discussed what it means to shift authentically 'From Santa to Service': committing to exploring "who we are in service to", being clear on our values and how we are showing up for our communities, and deeply considering how we can 'be both donor informed and community led'.



Two sets of concurrent sessions ran throughout the day and included a wide range of topics which included a deeper dive implementing the SDGs as a framework for funding, how philanthropy advising can empower both donors and communities, and improving funding practices. The unique environment of community foundation's governance was explored, along with emergency response planning and empowering the local charity sector with charity endowment funds.

Finally, the conference ended with a powerful challenge and reverberating message from Dr Hana O'Regan, challenging communities to understand the long, jagged tail of colonisation which continues to disempower and marginalise the indigenous people of this land. For community foundations, this means a crucial shared understanding that coloniality – of power, of knowledge,

of being - perpetuates inequities and that we hold an important role of driving togetherness as community, with a shared commitment to advancing equity and justice. Thank you, Hana, for your powerful challenge, which reinforces to us that this collective mahi matters deeply in progressing a just society.

From the team at CFANZ, ngā mihi nui to all our member foundations and our sector partners, including Community Foundations Australia, Mott Foundation, the Centre for Social Impact and the Global Fund for Community Foundations for your energy, your joy and your commitment to building a thriving community philanthropy ecosystem rooted in equity and empowering communities from within - te whakamana i ngā hapori.

Shaping your personal legacy

When Nikau Foundation was established in 1991 – the first community foundation of its kind in Aotearoa NZ – the world looked very different from what it does today. Over this time, the way people think about giving has also changed dramatically.

Donors are now thinking more strategically. They are thinking about the future and want to make sure that they are maximising the impact of their philanthropic dollar. Now, we also have a greater understanding that positive systemic change cannot be achieved by local or national government alone and that philanthropy has an important part to play in creating better outcomes for communities.

I am not sure that we have fully grasped the full potential of community foundations in Aotearoa NZ. But with a focus on growing generosity and connecting local donors with local need, these foundations have the potential to be changemakers.

At Nikau Foundation (the Greater Wellington region's community foundation), which I have the privilege of chairing, we have secured one of the biggest legacies in the history of New Zealand. The thoughtful decision by Mark Dunajtschik and Dorothy Spotswood is going to have a transformational impact on the lives of many people living with disability, long into the future. We also are delighted to work alongside so many other donors who wish to continue making an impact in our communities even after they're gone.



Working with donors and enabling effective philanthropy which is really going to shift the dial, is highly skilled work and has the potential to transform our communities.

What I notice in our culture is a real desire to make a difference. However, there is often a lack of knowledge of how to do this in practical, powerful and meaningful ways. This is where local community foundations really come into their own, guiding Kiwis to shape their legacies to help tackle the biggest issues and, crucially, remain relevant for the long term. Over time, invested funds give back far more to communities than one-off donations. It's a really smart way to give, ensuring long-term funding streams are directed into communities. Take a look at CFANZ's fund calculator as a guide and you'll see what I mean.

With the current mix of challenges our community is facing, building strong philanthropic ecosystems is more important than ever. A gift in your will, invested for the long-term benefit of your local community, is one way to make an enormous difference to the future of our nation.

Dame Fran Wilde, Chair of Nikau Foundation, the Greater Wellington region's community foundation

> <https://communityfoundations.org.nz/fund-calculator>

Wills Month *September 2024*



Giving story – home is where the heart is

Paul and Cathy Nicholson are among a growing number of New Zealanders leaving a gift in their will to benefit their local community. After decades living in the United States, the couple moved to Paul's home town of Nelson and have now pledged a bequest to the Top of the South Community Foundation.

"Home is absolutely where the heart is and I always knew I wanted to return home to Nelson and thankfully Cathy, who is American, didn't need too much convincing," Paul says.

"The reality for us is that we worked hard throughout our respective careers and we've been very fortunate to build a modest estate. Now with the time and the resources, it's about sharing those resources to support our community after we're gone."

Paul says pooling funds with others who also contribute to a community foundation is an opportunity to address local issues and to help future proof a community that you love.

"As we contemplate the end of our lives, it's a wonderful thing to think about our resources being used far into the future," says Paul.

"For us it's about transforming communities for good, we know the money we leave through the Top of the South Community Foundation will have a ripple effect."

The concept of community foundations originated in the United States and throughout the last century they were set up across North America and Europe. Nikau Foundation in Wellington was the first community foundation established in New Zealand in 1991 followed by Acorn Foundation in Tauranga in 2003. A further 16 have since been established, most recently the Southland Foundation in May 2024.



Over \$1.3b gifted by Kiwis

With the cost-of-living crisis, the ongoing impacts of the global Covid-19 pandemic, and increased natural disasters around the country in recent years, more New Zealanders are not only looking to support locally they are also leaving bequests in their wills to benefit their community.

Community Foundations of Aotearoa New Zealand Executive Director Arron Perriam says the organisation's 18 members collectively have \$260 million in invested funds received from bequests with an anticipated pipeline of many hundreds of bequests, adding up to an additional \$1 billion.

"Increasingly, Kiwis are of the view that the Government can't, or likely won't, solve all the challenges we face in this country; we all have felt this acutely in the wake of weather events, increased costs of living and the pandemic in recent years," Arron says.

"The power of communities to build their own future resilience, and care for their people and environment, resides somewhat with the people themselves. What we're seeing is a growing deep-rooted desire for Kiwis to leave their legacy locally, and that's where the local community foundation provides the essential infrastructure to manage legacy gifts, to give back to communities for the long term."

Chief Executive of Philanthropy New Zealand | Tōpūtanga Tuku Aroha o Aotearoa (PNZ) Rahul Watson Govindan agrees and says many New Zealanders have spent many years creating and building a community around them that they want to live in.

"Leaving a gift in your will is a powerful way for New Zealanders to ensure that the community that they've contributed to for so much of their lifetime continues to thrive, along with the people within it," Rahul says.

"At Philanthropy New Zealand we are encouraged to see Kiwis increasingly investing in their local communities for the long-term. Community foundations work with local people to see through their aspirations for the community they live in and love, identifying local needs and helping locals to discover how they can play their part in community transformation."



Partnering for local impact on global goals.

Community Foundations of Aotearoa New Zealand has partnered with the US-based Charles Stewart Mott Foundation to explore how our changemaking community work can advance the United Nations Sustainable Development Goals (UN SDGs). At CFANZ we are thinking deeply about how local action contributes to global outcomes, from reducing inequalities and supporting thriving communities to promoting environmental sustainability.

The UN SDGs provide a framework for imagining a fairer, more resilient world. Our work shows that local initiatives can play a powerful role in achieving these ambitions. In the pages that follow, we share stories of communities taking action, creating measurable impact, and demonstrating how Aotearoa NZ's local solutions connect to global challenges. These examples highlight that sustainable development is not just a distant ideal, it is something communities can shape and drive every day.



Example: Nikau Foundation reporting against SDGs in their Annual Impact Report

Community Impact

Funds which are building community



Across Aotearoa NZ, endowed funds are quietly becoming powerful tools for community transformation. These funds are not simply financial vehicles; they are long-term commitments that anchor community resilience and identity, ensuring that generosity today continues to create impact for generations to come.

Some examples include:

In May 2024, the **Southland Foundation** was launched, becoming the newest member of our national network. Southland Foundation is already stepping into the crucial role of connecting the region's resources with its community, laying the groundwork for long-term, place-based impact.

Meanwhile, **Hawke's Bay Foundation** has grown its endowment to more than \$12 million, providing a permanent, sustainable source of funding for community organisations across the region. These funds ensure that, even in times of uncertainty, local charities and initiatives have the reliable support they need.

Other regions are demonstrating the power of funds to act as catalysts for major community projects. **Momentum Waikato Community Foundation** is leading the development of the Waikato Regional Theatre, a cultural landmark funded by collective generosity and designed to become a hub of creativity for generations. Similarly, **Taranaki Foundation's** Destination Kāwaroa project has transformed a coastal precinct into a vibrant community space, built on a vision of generosity and pride of place.

Across the country, endowed funds are more than numbers on a balance sheet. They are living legacies, connecting local aspirations with community needs and building strong, resilient places for the future.



Trust Resettlements

Putting trust in community



Photo Credit: Taranaki Daily News

Charitable and family trusts are increasingly choosing to resettle their funds with local community foundations across Aotearoa NZ. This approach ensures the long-term sustainability of philanthropic efforts while amplifying their impact. Resettlements with local professional foundations enable the purpose of historical Trusts to continue long-term.

Some Trust resettlement examples include:

The Mackenzie Basin's golden grasslands and turquoise lakes inspired the 2010 Mackenzie Agreement - a shared vision to protect this iconic landscape. Formed in 2016 to champion that vision, the Mackenzie Country Trust has now passed its legacy to the **Aoraki Foundation**, creating the Mackenzie Country Conservation Fund to continue safeguarding this treasured region.

Geyser Community Foundation facilitated the resettlement of the Putaruru Veterinary Club Education Trust, creating an endowment fund to support local scholarships. This transfer ensures the trust's legacy continues sustainably, benefiting the community for generations.

In September 2024, management of the Noel Yarrow Puke Ariki Trust funds were transferred to **Taranaki Foundation**, securing the legacy of Noel Yarrow (1924–2008) and his wife, Melva. The Fund continues to honour their vision by supporting exhibitions, educational programmes, research, and community engagement at Puke Ariki, strengthening its role in the region.

Resettlements with local professional foundations enable historical Trusts to continue on with their mission long-term. Partnering with a community foundation ensures funds are professionally managed, strategically invested, and ensures that the Trust's purpose continues on.



Donor Stories

The heart of giving



Wellington City Council Archives, 00291-2059-3



Community foundations are powered by the generosity of individuals who care deeply about their local communities. Their contributions, whether through regular donations, bequests, or unique acts of giving, help create enduring legacies that transform lives.

In Wellington, through **Nikau Foundation**, the Joe Aspell Fund continues the legacy of former City Councillor Joe Aspell MBE, known for his quiet generosity. Through the Fund disadvantaged youth gain access to education, skills, and opportunities, ensuring Joe's spirit of giving continues to empower future generations.

Warner Haldane's generosity and love for community and music inspired the creation of the Eastern Bay of Plenty Music Development Fund through **Eastern Bay Community Foundation**. Supporting musicians and music education, the Fund will enhance the region's vibrant music culture by fostering skill development, live performance and community connection.

At **Sunrise Foundation**, Karen "Holly" Hollamby has chosen to support the community through a gift in her will. By contributing to the Foundation's General Fund, Holly ensures her generosity continues to strengthen local initiatives long into the future. Her story encourages others to think about the enduring impact of planned giving and how it can support an entire region long into the future.

These stories remind us that philanthropy is not only about financial contribution. It is about shaping communities, preserving local treasures, and nurturing future generations. Every act of giving, big or small, is an interconnected thread in the rich tapestry of Aotearoa NZ's community life.



Impact Stories

Creating ripples of impact



Community foundations play a pivotal role in transforming lives through local generosity. Some recent stories showcase the profound impact of personal giving in Aotearoa NZ.

In 2025, the **Christchurch Foundation's** Women Entrepreneurs Fund awarded \$10,000 to Jade Luxton, founder of Sterineedle. The grant is helping Jade cover her living costs so she can focus fully on growing her business - developing a vaccine needle sterilisation device that will strengthen biosecurity across New Zealand's agricultural sector.

Auckland Whale & Dolphin Safari, established in 2000, operates as a marine tourism experience and platform for research and conservation. Through **Auckland Foundation's** Gulf Guardians initiative, the company contributes to regenerating the Hauraki Gulf. A portion of each ticket supports local conservation efforts.

The Bream Bay Learning Community brought schools and local groups together for a fun Book Week swap, encouraging reading and connection. With support from the Northland Grassroots Fund, with **Northland Community Foundation**, every child took home a book. "The best outcome," says Gladys Rowsell, "was seeing our senior students step up to support the younger ones - our future leaders."

These simple stories show the power of local generosity and how it connects to local impact. Donors' interests, working together with the insight from local community foundations, produce a collective impact that sees lives transformed and communities across Aotearoa NZ strengthened.



The Great Wealth Transfer: our opportunity to do things differently

An article for professional advisors
by Eleanor Cater

Professional advisors, including lawyers and accountants, are the most trusted advisors to people with wealth. They hold a very special position of influence and are often intimately involved in helping clients preserve and grow their wealth, plan for the end of life and develop estate plans. However, while professional advisor education focuses on strategies to maintain and growth wealth what is not covered one of human's innate desires – how to do good by giving money away well.

Professional advisors reveal that they often lack the tools and can often lack the confidence to bring up this crucial conversation, even though it has been shown by research as a topic which sits close to the hearts of many clients and one that they will to embrace.

More than 100 years ago Andrew Carnegie, American philanthropist, sagely observed that “it’s more difficult to give money away intelligently than to earn it in the first place”. Not much has changed in the following century and Kiwis face a modern paradox of wanting to do good but not knowing how; there are a vast array of causes and giving vehicles and sometime the confusing landscape can lead to inaction due to the sheer complexity of options.

The good news is that professional advice can be incredibly enabling in the philanthropy space; professional advisors can help their clients to discover something quite extraordinary, about themselves and how to go about giving well. Community foundations – 18 of them around New Zealand – can work in partnership with professional advisors, boosting their philanthropic expertise and helping clients discover their philanthropy or giving ‘sweet spot’.

This more advanced philanthropy ecosystem in the UK provides us with a good roadmap and an opportunity to do things differently here in New Zealand. The Great Wealth Transfer of the baby boomers, which is sitting on our doorstep, and the deep needs of our communities, provides us with our ‘why’.

However, this is not the only ‘why’ at work. Professional advisors often describe ‘the philanthropy conversation’ as some of the most satisfying conversations of their careers. This is the opportunity to deeply discuss the things that really matter to their clients and to help them discover themselves as changemakers.

The philanthropy conversation can start as simply as:

What do you care about?

Have you volunteered or, is there a cause you are particularly passionate about?

What legacy do you want to leave the world?

Do you want to involve your family in shaping your giving plans?

Have you ever thought of making change happen through leaving a gift in your will? (It’s something other people do).

How do you want to be remembered?

These conversations, utilizing human skills and high EQ, touch on some of the deepest matters of importance to clients, driving loyalty and intergenerational relationships between clients and professional advisors. One study even showed that up to 40% of the next generation are more likely to stay with the family’s advisor if they have helped to shape the family’s philanthropy.

Additionally, what may surprise you, is the joy that philanthropy brings to people, described as a ‘warm glow’ from giving, it’s a researched phenomenon that might seem a little curious, however is absolutely real: people really do get great joy from giving, whether during their lifetime or by leaving a gift in their will. This may be linked with shaping their identity, during their lifetime and beyond, changing the way that your clients see themselves and providing the empowerment people need to do something extraordinary.

My suggestion is to make the philanthropy conversation a part of financial conversations and estate planning; it may not appeal to all of your clients, but research tells us that it will appeal to many who may just discover that they can be the changemakers that their communities need. I am certain that many of your clients will thank you for helping them step onto that journey of discovery of how to give their money away well.

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