



# PHILANTHROPY SERVICES

## GIVING IS FOR ANYONE.

Philanthropists come from all walks of life and Equity Trustees can help you bring your vision for giving to life and use your wealth to make a difference to the community for the long term.

By structuring your giving, either during your lifetime or via your Will, your funds are protected, invested and growing over time – generating income into perpetuity to be given to the causes you're most passionate about.

**Sustainability** – for your personal legacy and for the for-purpose sector as well.

## SHARE YOUR LOVE FOR YOUR COMMUNITY

With so many ways to put your money to work for the good of the community, it can be hard to determine which structure will work best for you. Through talking with you about your giving goals, we can help create a safe financial structure to bring your giving vision to life.

## STRUCTURING YOUR APPROACH

If you're able to make a difference and experience the joy of giving to causes you care about Equity Trustees can assist you in establishing a permanent legacy for you and your family that makes a positive change in the world.

Establishing a giving structure that is right for you and then embarking on the vision you have for the communities you care about is complex as there are many options to consider. From establishing a sub-account or your own Foundation to developing a philanthropic granting strategy, we can give you expert guidance to bring your vision of philanthropy to life.

## WE'LL HELP YOU MAKE A DIFFERENCE WITH STRATEGIC GIVING

For more than 145 years\* we've been helping Australians establish powerful legacies for their families with tailored advice from industry experts. Equity Trustees is one of the largest philanthropic funders in Australia, overseeing more than 1,000 charitable trusts and foundations and stewarding more than \$100m in charitable giving each year.

Our dedicated philanthropy team will take the time to understand your needs and values, help you define your goals and share how your funds can be leveraged in the best possible way. With an in-house support team of investment, tax and legal experts, we can carefully manage your legacy into the future and make the most of your resources. So that your 'good giving', supports impactful work in our community.

\*Equity Trustees was established in 1888. ANZ Trustees (acquired by Equity Trustees in 2014) was established in 1878. Australian Executor Trustees (acquired by Equity Trustees in 2022) was established in 1879.

## THERE'S SEVERAL WAYS WE CAN HELP TO PROTECT YOUR CONTRIBUTION

Thanks to our many years of experience, we know what works best for each type of giving. We can recommend several structures to ensure that your funds have maximum impact for years to come.

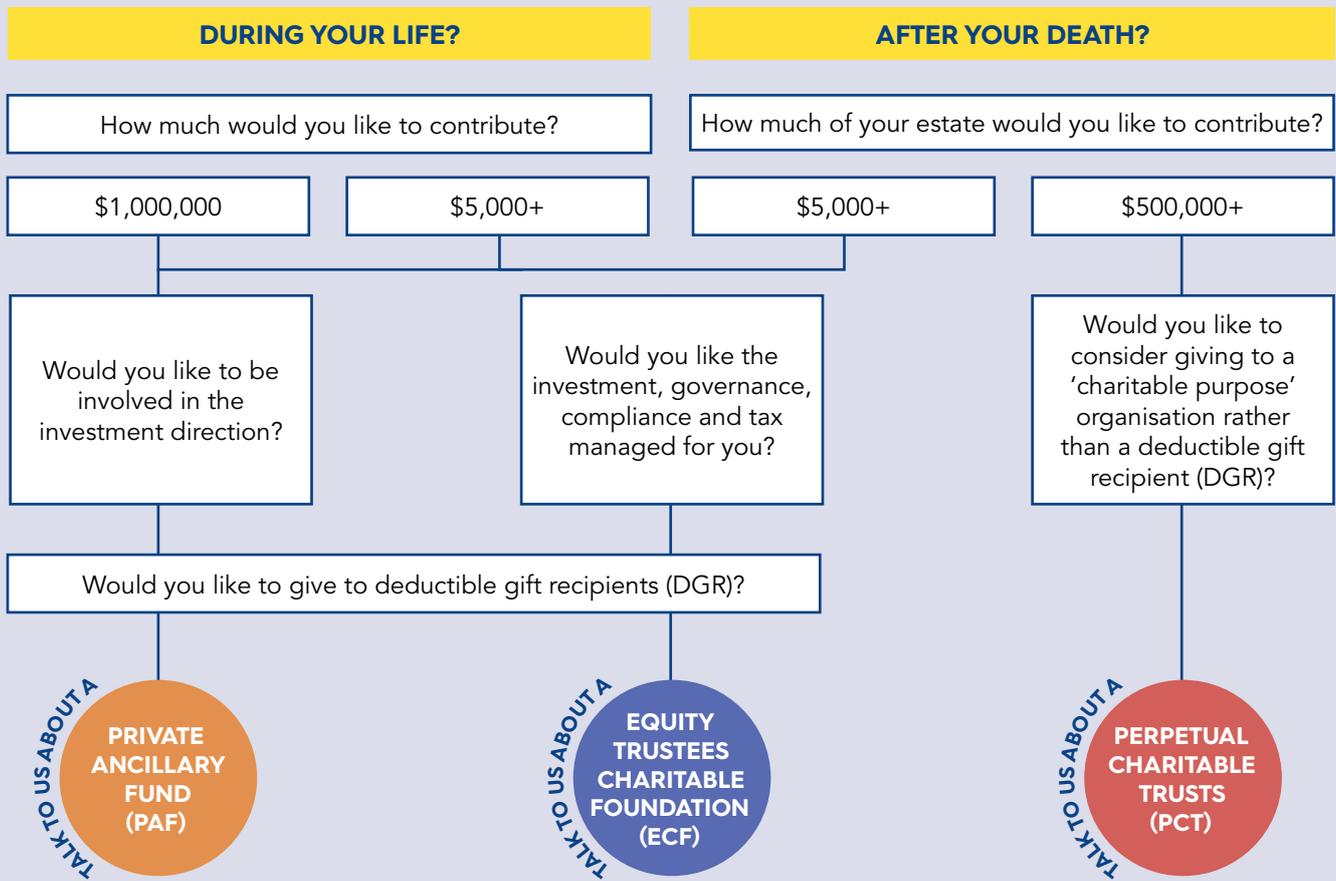
First, we seek to understand if you would like to start your giving now, or after you pass on. We then ascertain the types of causes and organisations you might like to support. Then we find the best structure to execute your giving objectives. There is some more detail below about these.

### EQUITY TRUSTEES CHARITABLE FOUNDATION (PUBLIC ANCILLARY FUND SUB-ACCOUNT)

Creating a sub-fund within the [Equity Trustees Charitable Foundation \(ECF\)](#) is an easy and tax effective way to begin your journey into philanthropy. A sub-account can be created with just \$5,000. Equity Trustees manages all the investment, compliance, governance and administration of your sub-account, leaving you to recommend which deductible gift recipient (DGR1) organisations you'd like to support each year. Fees are adjusted according to each philanthropist's need for additional support and service. Your interaction with your philanthropy is enhanced by an easy-to-use portal which offers transparency and accessibility to your sub-account. Sub-accounts are also appropriate for those wishing to activate their structured giving via their Will.

# WHICH STRUCTURE IS RIGHT FOR YOU?

## WHEN WOULD YOU LIKE TO COMMENCE PHILANTHROPY?



### PRIVATE ANCILLARY FUNDS

A Private Ancillary Fund (PAF) provides a tax-effective way for people who wish to make philanthropic contributions to organisations that qualify as DGR1. This is perfect for philanthropists who have more than \$1,000,000 to seed the vehicle, desire a standalone structure and are also keen to be involved in the investment decisions. PAFs can invest in a range of investments including cash, shares, fixed interest securities, and property.

### PERPETUAL CHARITABLE TRUSTS

A Perpetual Charitable Trust can be included in your Will to support charities, charitable causes, scholarships and awards in perpetuity. It is a wonderful way to continue your contribution to charities or causes that are important to you. A trust can have your name, your family's name, or even be named in the memory of someone you loved or admired. A Perpetual Charitable Trust can act as an effective estate planning tool and once created can offer a degree of flexibility in terms of the types of assistance that the Trust can provide each year.



What will always matter to us – and what has enabled Equity Trustees to stand the test of time – is the quality of the care we show each other. We show care not just in our personal interactions, but in the technical and service support which works behind the scenes to ensure our clients and their assets are secure and services are structured to suit individual needs.



**IAN WESTLEY**  
Executive General  
Manager, Trustee and  
Wealth Services

## ABOUT US

Equity Trustees was established in 1888 for the purpose of providing independent and impartial trustee and executor services to help families throughout Australia protect their wealth. As one of Australia's largest and oldest listed independent trustees, we offer a diverse range of services to individuals, families and corporate clients including asset management, financial advice, estate planning and philanthropic services.

In 2022, Australian Executor Trustees (AET) joined the Equity Trustees group of companies, expanding our network of offices into all major cities, and the capability of our specialist teams. Together we share a deep commitment to our purpose of helping people take care of the future.

Equity Trustees Wealth Services Limited (ABN 33 006 132 332) AFSL 234528 and Australian Executor Trustees Limited (ABN 84 007 869 794) AFSL 240023 are part of the EQT Holdings Limited (ABN 22 607 797 615) group of companies, listed on the Australian Securities Exchange (ASX:EQT).

In preparing this information, we did not take into account the investment objectives, financial situation or particular needs of any particular fund or person. Subject to any contrary provision in any applicable law, neither Equity Trustees nor any of its related parties, their employees or directors, provide any warranty of accuracy or reliability in relation to such information or accepts any liability to any person who relies on it. No reader should act on any matter without first obtaining professional advice which takes into account an individual's specific objectives, financial situation and needs. Copyright © 2024 Equity Trustees, All rights reserved. This brochure was produced April 2024.

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