Equity Trustees

MEDIA RELEASE

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Fostering stronger family bonds through philanthropy in the festive season

As Australians come together over the holiday season, many are looking beyond traditional gifts and turning to charitable giving as a meaningful way to connect with family members and open timely conversations about how wealth and values are passed between generations.

Australia was ranked as 11th most generous country in the Charities Aid Foundation 2026 World Giving Report with 67% of people donating to charity or volunteering their time[1].

“Giving back is an important value for many Australians. We're expecting a massive transfer of family wealth between generations over the next few years and families are using their time together to share their priorities and their wishes for the future,” said Amanda Sartor, National Manager of Active Philanthropy at Equity Trustees.

“Involving children, parents and grandparents in conversations about giving early on can help strengthen intergenerational connections, foster a shared sense of purpose, and ensure families have a lasting impact on the causes and communities that matter to them.

Shifting philanthropic focus

Increasingly, people are moving away from physical gifts and choosing to donate to charity or even establishing charitable funds that can give back to the community for generations. Structured giving through vehicles such as private and public giving funds or donor-advised funds is becoming more popular as family demographics change.

“We’re finding younger people with accumulated wealth want to practice philanthropy now, not just leave a legacy,” said Ms Sartor. “Now more than ever, the for-purpose sector needs philanthropic support, with research showing the decline in social cohesion even while demand for community supports increase[2].”

Equity Trustees has also seen a shift in the causes philanthropists are supporting, to focus more on human services such as housing and cost of living support, as well as climate and environment becoming a growing focus for giving.

In 2026, 29% of charitable grants made through Equity Trustees were directed towards human services, up from 23% the year before[3].

The health sector was still the biggest priority for philanthropists, with 34% of funding going to organisations in health-related areas such as medical research, disability services, healthcare access and mental health and wellbeing.

[1] Exploring the data | The CAF World Giving Report
[2] Mapping Social Cohesion 2026
[3] Equity Trustees Giving Highlights 2026 - Page 1

"At this time of year, we see clients reflecting on what's important in life. Those meaningful conversations strengthen family connections, while engaging in a shared activity like philanthropic giving builds bridges between generations that endure through the years," said Ms Sartor.

Equity Trustees supports donors throughout their philanthropic journey, from establishing a charitable fund to managing grants and connecting them with causes that align with their values.

How to strengthen family ties and make a lasting difference in the community

This holiday season, Equity Trustees encourages Australians to consider:

- **Talking about what matters** to the family, sharing values and priorities.
- **Setting up a new charitable fund** before Christmas to create a new family tradition of giving that lasts for generations.
- **Topping up existing charitable funds** and discussing how these contributions benefit the community.
- **Exploring easy ways to give with purpose** through the Equity Trustees Giving Portal.

"Christmas is a time for giving – whether that's gifts under the tree or providing impactful funding to charitable organisations. Creating a shared philanthropic tradition is a wonderful way to bring families together while building an enduring family legacy that benefits the community," said Ms Sartor.

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Equity Trustees is the brand name of EQT Holdings Limited (ABN 22 607 797 615) and its subsidiary companies, publicly listed company on the Australian Securities Exchange (ASX: EQT) with offices in Melbourne, Sydney, Brisbane, Adelaide, and Perth.

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 Australia's leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services as well as Responsible Entity (RE) and Custodian services for external Fund Managers.