

Everlasting generosity made easy



YOUR GIFT



IS INVESTED
AND GROWN



AND THE ONGOING
INCOME EARNED



GOES TO THE LOCAL
CAUSES YOU LOVE

+ WHAT IS AN ENDOWMENT FUND?

An endowment fund is an invested gift, with the income going to a cause(s) of the donor's choice. It enables generous people to give long-term, well beyond their lifetime, to a cause or charity they care about in their local community.



What we like most about the endowment concept is that we can have the pleasure of giving now, and the fund will continue to grow under its own momentum.



Totara Fund

+ WHY A COMMUNITY FOUNDATION ENDOWMENT FUND?

- Uses your community foundation's expertise in strategic giving, investment management, grant making and community knowledge.
- Community foundation funds are entirely donor-focused, distributing income to the charitable causes the donor chooses.
- Donors can remain as private or as public as they wish.
- Enables giving that goes further and lasts forever.
- Provides a platform for multi-generational giving and community impact.
- Flexibility of gift types; giving can be now and/or in the future (bequests).
- Attracts tax benefits.



2003
(year 1)

Edna Brown Fund established with a \$67,200 gift to the Acorn Foundation.

Initial gift grows and pays out the income earned each year.



2018
(after 15 years)

\$57,000 in cumulative grants \$84,700 endowment balance.

Original balance and grants made is growing. The gift has more than DOUBLED.



2033
(after 30 years)*

\$138,500 in cumulative grants \$112,500 endowment balance.

Original balance and grants made continues to grow, and the gift has grown 4 TIMES.

* Estimated growth rate of 7.5 % for future years and annual distribution of 4%.

Talk to us about how we can help your client set up an Endowment Fund: info@aucklandfoundation.org.nz