

Trust Transfers

The Aoraki Foundation offers simple, flexible and efficient solutions for the settlement of charitable or family trusts.



What is a Trust Transfer?

A trust transfer or trust resettlement is a simple way to wind up a trust while still maintaining the original purpose and legacy of the Trust.

Operating a trust or charity has become increasingly challenging with new legislative changes, finding new trustees, investing capital and increasing compliance expectations. Trusts & societies are looking for a solution. They don't want to lose the history of their charity but realise they can't continue on in their current structure. A trust transfer through the Aoraki Foundation may be the answer.

How does it work ?

- Your trust or organisation sets up a Named Fund with the Aoraki Foundation, the name of this could be similar to your current name or something new.
- You set the purpose of the new fund, which would most likely align with your original purpose.
- You decide on a distribution method, this may be through our existing distribution committee or through your own committee bespoke committee.
- The Aoraki Foundation takes care of the governance, charity reporting, distributions, finance, and marketing.
- Your fund will be pooled with our other invested funds managed by professional advisors.
- A portion of the income is distributed each year to the community while some income is retained to grow the fund.
- The Aoraki Foundation produces annual reports of returns and distributions.

Why is the Aoraki Foundation a good option?

- Funds are professionally managed by leading investment advisors with robust governance from a board of appointed Trustees.
- Economies of scale lead to lower costs than running a private charitable trust.
- We are an independent and safe pair of hands for your philanthropic ambitions.
- All donations provide enduring support to local charities and causes in South Canterbury, ensuring that you can give where you live.
- The Aoraki Foundation can assist you to maximize the impact of your gift.

Our low-cost structure enables capital to remain intact, while distributing the income back to the community.



The Aoraki Foundation has been resettling trusts and societies in South Canterbury since 2013.



What is a Community Foundation?

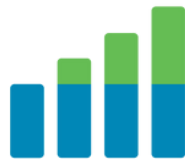
Community Foundations are local, independent, and not-for-profit. They run a well-proven model of giving which has been growing across the world for over 100 years, and they are now established in 17 regions in New Zealand. Community Foundations build long-term, reliable funding streams for their local communities by investing and growing the donations they receive.

Aoraki Foundation

The Aoraki Foundation is South Canterbury's Community Foundation. Governed by a group of experienced volunteer trustees, we provide a trustworthy vehicle for you to contribute to the local causes that really matter to you. We believe in a better South Canterbury for all, and see this being achieved through the power of giving. Through our smarter giving model any gift to the community is everlasting.



YOUR GIFT



IS INVESTED AND GROWN



AND THE ONGOING INCOME EARNED



GOES TO THE LOCAL CAUSES YOU LOVE.

F.A.Q.s

Q. How are the funds invested?

A. We use two professional fund managers overseen by an independent investment committee. We invest in a balanced mix of fixed interest, bonds, and equities.

Q. Do the distributions stay local?

A. Yes, all the distributions are for the benefit of South Canterbury, or if desired a specific district/area within South Canterbury.

Q. How long would the fund last for?

A. As the capital is not distributed these funds carry on forever. The Aoraki Foundation will also grow the capital (protecting it from inflation) so it will have the same impact in 30 years than it has today.

Q. Can further donations be made to the fund?

A. Most definitely, one of the great benefits of the Aoraki Foundation is we have a track record of attracting new gifts to local funds. This could be a living donation or a gift in a will.



For more information on Trust Transfers please contact Kirsty on: 027 226 4533 or kirsty@aorakifoundation.org.nz
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