

# Due Diligence: Choosing your philanthropic services referral partner **For Professional Advisors**

**With more than 27 years' experience, Australian Communities Foundation makes philanthropy easy and accessible for people from all walks of life, all over Australia.**

When your clients give with us, they benefit from the expertise, grantmaking advice, networks and national giving community we've built since 1997. We work flexibly with clients to streamline their giving and amplify their impact.

## Australian Communities Foundation: Impact and Overview

Australian Communities Foundation operates three charitable trust funds, providing flexibility to suit individual giving preferences and areas of interest. The majority of Named Funds are established in the Foundation's tax-deductible Main Fund (ABN: 57 967 620 066), which can give grants to DGR item 1 and income tax-exempt charities. The Foundation also operates an Extension Fund and Scholarship Fund.

**630+**

Funds and Foundations serviced by ACF

**\$39.6M**

Total \$ granted in 23/24

**\$180M+**

Total \$ granted since 1997

**\$210M+**

committed to charity in structures supported by ACF as at June 24

**5.11%**

5yr CAGR for long-term strategy (5+ years) as at Sep 24  
40% defensive  
60% growth

**2.91%**

5yr CAGR for short-term strategy (2.5–5 years) as at Sep 24  
85% defensive  
15% growth

## What to consider when choosing a philanthropic services partner

### Sustainability and longevity

How long has the organisation existed and does it have good governance to ensure its longevity? Most philanthropic journeys last at least 20-30 years.

### Fees and charges

Are the fees and charges commensurate with the scale of investment and services provided?

### Flexibility

Are there any undue restrictions on your client's giving or is the service fully donor advised? Can the organisation provide portability should things change over time?

### Educational and networking opportunities

What kind of opportunities does the organisation provide for your clients to learn about best practice giving and meet other donors and changemakers?

### Investment philosophy and returns

Are the investment philosophy and returns appropriate for your client's giving goals? Are the funds invested in an ethically responsible manner?

### Ease of operation

Does the organisation provide ease of operation for you and your clients, with appropriate reporting and simple processes?

### Strength of client services

Are client services a key element of the organisation's offering? Can the organisation help develop, review and evaluate your client's giving and their impact over time?

### Shared values

Does the organisation share values with you and your clients? What sort of Australia are they hoping to see and how are they going about it?

## Our Investment Commitment

100 per cent of our investment portfolio is responsibly invested, actively seeking out strong financial returns and a positive social or environmental impact. Our approach looks to ensure growth of your client's funds without risking their initial investments.

As the first Australian philanthropic foundation to become a signatory to the UNPRI: Principles for Responsible Investment and a recognised leader in this space, we're proud to increase the impact of your clients' giving by ensuring their funds are doing good while waiting to be granted out.

Signatory of:



## Fees and charges

### Named Funds

| Annual fees effective 1 July 2024 |                |
|-----------------------------------|----------------|
| Assets up to \$100,000            | 2.5%           |
| Next \$100,000 – \$5M             | 2.0%           |
| Next \$5M – \$10M                 | 1.0%           |
| Assets over \$10M                 | By arrangement |
| Collective Giving Funds           | 2.5% flat fee  |

No establishment fee charged.

### Private Foundations

Private Foundations can be established through Australian Communities Foundation for a competitive fee. Your client can then choose the level of ongoing support they would like through our Private Foundation packages.

#### Establishment Fee

\$5,000 + disbursements

**Ongoing Service Fee** dependent upon package chosen

Granting: \$13,550 per annum

Compliance: \$11,450 per annum

Granting + Compliance: \$20,350 per annum

## Governance

Australian Communities Foundation is a not-for-profit company limited by guarantee. Operations are overseen by a voluntary Board of Directors made up of leaders representing a broad cross-section of the community.



**Fiona McLeay**  
(Chair), LLB, LLM



**Chris Croker**  
MBA, BE



**Penny Burke**  
BBM



**Gia Cari**  
LLB, LLM



**Adam Milgrom**  
BBus, GAICD



**Glen Noonan**  
BSc, CA, GAICD



**David Ritter**  
BA, LLB, MA, GAICD



**Caroline Vu**  
LLB



**Malinda Wink**  
BA/BCom

### Board Committees

#### Finance, Risk, Audit & IT Committee

Glen Noonan (Chair), Penny Burke, Gia Cari, Chris Croker, David Ritter

#### Investment Committee

Sue Dahn (Chair), Chris Croker, Adam Milgrom, Caroline Vu

#### Philanthropy & Impact Committee

Malinda Wink (Chair), Gia Cari, Caroline Vu

#### Nominations Committee

Penny Burke (Chair), Fiona McLeay, David Ritter, Malinda Wink

### Learn more

Want to learn more about how we can support you and your clients?

Contact Olivia on 03 9412 0412 or email [olivia@communityfoundation.org.au](mailto:olivia@communityfoundation.org.au)

Learn more at [communityfoundation.org.au](http://communityfoundation.org.au)



**Olivia Clark-Moffatt**  
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