

# Your philanthropic services referral partner

## For Professional Advisors

### Why partner with us?

Because you know your clients and we know philanthropy.

✓ **Australia's only nationally focused community foundation**

We are uniquely placed to provide world-class philanthropic solutions and services combined with a deep understanding of the Australian community.

✓ **Over 27 years of experience**

Since 1997, we have partnered with wealth advisors, estate planning lawyers and accountants to help their clients achieve financial planning objectives and charitable giving goals with tax advantages. From establishing appropriate giving structures to building your clients' legacies and providing them with grantmaking guidance on community needs, we act as your team's trusted philanthropic advisor.

✓ **Flexible approach**

We work in partnership with you, either in the background supporting you to have the conversation with your clients about developing a philanthropic plan, or we can offer advice directly. However you prefer to partner, we will always respect and work within the relationships you have established.

**We are your philanthropic services referral partner who effectively and efficiently provides:**



#### Structure

We offer products that enable your clients to structure their giving, including Named Funds and Private Foundations.



#### Services

We provide services to support your clients in maximising their impact and achieving their giving goals.



#### Solutions

We offer tools and educational opportunities to support you and your team in providing the right advice to your clients.

**For your clients**

**For you and your team**



“What Australian Communities Foundation offers is accessible philanthropy with the administrative burden taken care of so that our clients can focus on what's important, which is giving the money away effectively... I'm convinced that community foundations are going to be the engine room of growth when it comes to structured giving in Australia and more and more advice firms are going to understand and appreciate the critical role community foundations can play in a client's wealth planning.”

**Chris Wilson**, Partner at Koda Capital's  
Philanthropy & Social Capital division



## Support for your clients



### Structure

There are a variety of ways your client can structure their giving. The right solution needs to consider their goals, scale, timeline, values, tax implications and more. Members of our team are experts in identifying the appropriate structure for a variety of circumstances. Popular structures include, but are not limited to:

- **Named Fund:** The easiest and most accessible way to structure your clients' giving.
- **Private Foundation (PAF):** Ideal for those who want to manage their own investments and have larger sums to establish.
- **Gift in Will:** Leaving a gift or bequest can help support causes or non-profit organisations your clients care about beyond their lifetime. Not everyone feels they are able to give during their lifetime and may prefer to create a legacy that starts after their death.



### Services

To support our community of givers, Australian Communities Foundation provides a variety of services, including:

- Tailoring giving plans and strategies
- Taking care of the governance, administration and compliance
- Connecting with local causes, programs or charities and offering inside knowledge on those doing impactful work across Australia
- Accommodating gifts such as real estate, life insurance policies or shares, which are not easily transferable to other charitable entities
- Managing philanthropic fund investments and distributing income
- Working through possible granting processes
- Helping with complex philanthropic objectives
- Growing philanthropic knowledge, including interest groups, tailored family programs and more
- Reporting on investment returns and granting

## Support for you and your team



### Solutions

It is crucial you are ready to provide the right advice and support to clients when it comes to philanthropy. Australian Communities Foundation assists by working with your team to provide tools and educational opportunities that are timely, efficient and comprehensive. To support our partnering advisors, we offer a variety of bespoke solutions, such as:

- **Philanthropy 101:** 1-hour interactive workshop delivered onsite to upskill your team.
- **The Conversation:** An in-depth client encounter assisting your confident journey through values-based conversations with your clients. Build stronger and longer relationships through more meaningful connections.
- **Tools:** A suite of simple, plain language tools to enhance the advisory relationship and your understanding of philanthropic services and offerings. We can also provide a variety of tailored resources for your organisation.

### About us

**Australian Communities Foundation is a non-profit organisation that supports and enables smart, rewarding and effective giving.**

Our purpose is to activate a nation of givers to create a fairer and more sustainable Australia. With more than 27 years of experience in catalysing positive social and environmental change, we make impactful philanthropy easy and accessible for people all over the country.

### 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**  
Director of Engagement  
and Advisory