

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

Australian Communities Foundation is a non-profit organisation and Australia's only national community foundation, dedicated to making effective giving easy and accessible.

Since 1997, the Foundation has supported, connected, and inspired a diverse community of givers to amplify impact, offering structured giving solutions, expert advice, and opportunities to collaborate for a thriving and inclusive Australia.

Australian Communities Foundation: Impact and Overview

Australian Communities Foundation operates four 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](#), [Scholarship Fund](#), and [Community Charity Trust](#).

730+

Funds and Foundations serviced by ACF

\$25.2M

Total \$ granted in 2025

\$220M+

Total \$ granted since 1997

\$230M+

committed to charity in structures supported by ACF as at Dec 25

7.43%

5yr CAGR for long-term strategy (5+ years) as at Sep 25
40% defensive
60% growth

3.82%

5yr CAGR for short-term strategy (2.5–5 years) as at Sep 25
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% of the ACF portfolio is responsibly invested. With the support of our advisors, Koda Capital, we actively seeking out strong financial returns and positive social and environmental outcomes. Our approach looks to ensure the growth of your clients' 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

Compliance: \$12,050 per annum

Granting: \$14,440 per annum

Granting + Compliance: \$21,690 per annum

Governance

ACF 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,
GAICD



Tessa Boyd-Caine
MCrim, PhD, GAICD



Gia Cari
LLB, LLM



Kylie Charlton
BCom, MBA

Board Committees

Finance & Risk Committee

Gia Cari (Chair), Chris Croker, Kate Fazio

Investment Committee

Kylie Charlton (Chair), Chris Croker, Kate Fazio, Caroline Vu

People, Culture & Governance Committee

Malinda Wink (Chair), Tessa Boyd-Caine, Gia Cari, Fiona McLeay, Caroline Vu



Chris Croker
BE, MBA



Kate Fazio
LLB/BA, MA-SI



Caroline Vu
(Deputy Chair) LLB



Malinda Wink
BA/BCom

Learn more

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

Contact Sally on 03 9412 0430 or email sally@communityfoundation.org.au

Learn more at communityfoundation.org.au



Sally Hines
Director of Engagement
and Advisory



Australian Communities Foundation partners with professional advisors, including wealth managers, financial planners, lawyers and accountants, to provide philanthropic services that help clients achieve their charitable giving goals.

When you partner with us, you can retain complete control of your client relationships or we can offer advice directly. Our services are tailored to complement the support you already provide.