

## INTRODUCTION TO

# Named Fund Plus



**Named Fund Plus is a new offering under Australian Communities Foundation's Community Charity Trust.**

Designed for flexible giving, this Fund accepts contributions from a broader range of sources, including structured giving vehicles (DGR2s) such as Private and Public Giving Funds (formerly ancillary funds).

It also unlocks new opportunities to give beyond traditional charity categories (DGR1), enabling donors to give tax-deductible donations to for-purpose organisations and individuals carrying out DGR1-aligned activities.

## A NEW WAY TO GIVE

**Establishing a Named Fund Plus is an easy, tax-effective and strategic way to support the causes you care about – whether you are an individual, family or community group.**

When you open your Fund with us, we take care of the administration and compliance, leaving you free to focus on the joy of giving.

Your balance is responsibly invested, and grants can be made at any time to not-for-profits, organisations, and individuals who are undertaking DGR1-aligned activities, without the need to be DGR1 registered.

## HOW IT WORKS

### 1. ESTABLISH YOUR FUND

Make a tax-deductible donation to establish your Named Fund Plus and gain access to all benefits of our giving community, including grantmaking advice and networking opportunities.

### 2. BUILD YOUR BALANCE

You can make additional donations at any time and invite others to contribute. Returns from responsible investments are applied to the balance of your Fund.

### 3. GIVE TO THE CAUSES YOU CARE ABOUT

Plan when the money is granted out based on your giving goals and the needs of the organisations supporting the causes you care about.

## NAMED FUND PLUS: BUILT ON OUR TRUSTED MODEL

- ✔ **Tax-deductible donations**
- ✔ **Online portal access** for making donations and grants, and reviewing your Fund's activity
- ✔ **All administration, compliance and governance** covered by our team
- ✔ **Up to 10% of your Fund's assets** available for Fund-related expenses
- ✔ **Your Fund can be public or private** – it's up to you
- ✔ **\$1,000 minimum grant** to DGR1 and DGR1-aligned organisations and individuals\*
- ✔ **No establishment fee** – \$50,000 min Fund balance
- ✔ **Get set up in 48 hours**
- ✔ **100% responsibly invested portfolio**
- ✔ **Standard Named Fund fees** apply
- ✔ **Benefits of joining our giving community**, including strategic grantmaking inspiration, co-funding initiatives

**Named Fund Plus structures do not offer the same portability as Named Funds.** They are designed to remain within Australian Communities Foundation's Community Charity Trust and are not transferable.

\* Granting to non-DGR1 organisations and individuals will incur additional fees



## WHAT'S DIFFERENT ABOUT A NAMED FUND PLUS?

### EXPANDED ELIGIBILITY

A Named Fund Plus can **accept donations from individuals, organisations, and now DGR2s** (e.g., Private and Public Giving Funds, also known as Private Ancillary Funds or PAFs and Public Ancillary Funds or PuAFs).

A Named Fund Plus can **grant to non-DGR1 entities who undertake DGR1-aligned activities** – this includes NFPs, organisations, social enterprises, and individuals (fees apply).

## 4 KEY BENEFITS

There are four key reasons to open a Named Fund Plus for your giving. In addition, when you join, you gain access to all the benefits of our community, including recommended giving opportunities aligned with your interest areas, co-funding initiatives, and networking opportunities with likeminded donors.



### 1. GIVE NOW, DECIDE LATER

When you donate to your Named Fund Plus, you receive an immediate tax deduction, then can decide where you'd like to give at a time that's right for you.



### 2. RESPONSIBLE INVESTING

Your donations are responsibly invested, meaning your money does good in the community while it waits to be granted out to the causes of your choosing.



### 3. GET ADVICE ON YOUR GIVING

When you open your Named Fund Plus, you gain access to our philanthropic expertise. We can help you develop a giving strategy and connect you with organisations doing great work.



### 4. BUILD A LASTING LEGACY

Your balance can be invested for the long term so you can support the causes you care about beyond your lifetime. A Fund can also be a great way to honour a loved one, or get your family involved in giving.

## LEARN MORE

### OUR SERVICES

Want to find out more about our range of products and services?

Visit our website:  
[communityfoundation.org.au/philanthropic-services](https://communityfoundation.org.au/philanthropic-services)

### CONTACT US

Our team is here to help you every step of the way.

T 03 9412 0412  
E [info@communityfoundation.org.au](mailto:info@communityfoundation.org.au)

### FEES

Visit our website for fee information:  
[communityfoundation.org.au/fees](https://communityfoundation.org.au/fees)

From 2030, Funds may be required to distribute a minimum of 4% per annum to meet legislative requirements. To support long-term sustainability, annual granting maximums may also be considered in future years.

Australian Communities Foundation is a non-profit organisation that supports and enables smart, rewarding and effective giving. We nurture values-led philanthropists who give with purpose, strategy, and heart.

Since 1997, we've supported a diverse community of givers with expert guidance, structured giving solutions, and opportunities to contribute to a thriving and inclusive Australia.

[COMMUNITYFOUNDATION.ORG.AU](https://communityfoundation.org.au)



LEARN MORE +  
GET STARTED

