



# Charitable Trusts

## Give back to the causes that matter most to you

Create a charitable trust to support the causes close to your heart, whether that's in education, religion, arts and sciences, to reduce poverty or perhaps a community initiative

## What is a charitable trust?

A charitable trust holds and protects your assets specifically for charitable purposes, so that you can leave a lasting legacy that makes a difference by providing ongoing support after you've gone.

## How does it work?

Charitable trusts can be set up during your lifetime or through your will for after you're gone. You can decide the purpose of your trust, who you'd like it to benefit (and how), and how much can be distributed or granted each year. They work best when there is enough money to allow for ongoing charitable gifting and capital growth. Generally speaking, this needs an initial contribution of at least \$300,000.

For gifting of less than this, there are other ways to support the causes you care about like making a bequest in your will or contributing to an existing trust.

We'll take care of setting it up, the registration and the ongoing administration of the trust.

Other people or organisations can also make donations to your registered charitable trust and these donations are generally tax free.

## Why set up your charitable trust with us?

We work hard to ensure your intentions are carried out long after you're gone by providing specialist

trustee services for the life of your charitable trust. When you choose us to administer your charitable trust we take care of:

- Registration
- Reporting
- Granting
- Legal services
- Accounting and tax services
- Making sure assets are invested to provide lasting benefits

**We grant more than \$11 million each year through the 450 charitable trusts we administer, supporting a wide range of charitable purposes.**

## How much does it cost?

With no trusts being the same, the cost will depend on the services required to meet the need of each individual charitable trust. We will discuss what you want to achieve, suggest the best way to structure your charitable trust, and then provide an estimate for any subsequent work we do.

## Get in Touch

You can reach out to our team by email at [info@publictrust.co.nz](mailto:info@publictrust.co.nz)

Or, you can give us a call on **0800 371 471**.

[publictrust.co.nz](https://publictrust.co.nz)



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