



TRUST TRANSFERS

Northland Community Foundation offers a simple, powerful and practical solution for the resettlement of Charitable Trusts.

What is a Trust Transfer?

A trust transfer or trust resettlement is a simple way to hand over the legal ownership and administration of a trust while still maintaining the trust's original purpose and legacy. Operating a trust or charity has become increasingly challenging with new legislative changes, finding new trustees, investing capital and increasing compliance expectations. Trusts and Societies are looking for a solution. They don't want to lose the history of their charity, and may still want to be involved in decisions about how the funds are used, but they realise they can't continue in their current structure. A trust transfer through Northland Community Foundation may be the answer.

How does it work?

- Your Trust or organisation sets up a Named Fund with Northland Community Foundation, transferring the balance from the trust into the new Fund
- You set the purpose of the new fund, which would likely align with your original purpose.
- Grants are distributed every year, forever – creating a permanent funding stream for the causes your trust was set up to support. You can be involved in this process, if you choose, or allow our grants committee to manage it.
- A portion of the income is distributed each year, while some income is retained to grow the fund.
- Funds are managed by investment advisors in line with our Statement of Investment Policy and Objectives (SIPO).
- Northland Community Foundation produces annual reports of returns and distributions.

Why is Northland Community Foundation a good option?

- No loss of identity or purpose: Retain the same name and mission but let us do the hard work.
- We take care of all the legal, administrative, distributing and reporting requirements – leaving you free to focus your time and energy on the work your Trust or Society was created to do.
- Your Trust will benefit from our low-cost structure and economies of scale so your generosity can continue to be felt for generations to come.
- Benefit from our volunteer Board of Trustees with a diverse set of skills and a deep connection and love for our local community.
- Revitalise your Trust's story. We will ensure your Trust's story is told long into the future

Thank you for considering partnering with Northland Community Foundation. Please reach out with any questions.

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With Northland Community Foundation, your generosity today will make a lasting difference for the future of our region.

A safe pair of hands for the next chapter of your Trust.

What is a Community Foundation?

Community Foundations are local, independent, and not-for-profit. They run a well-proven model of giving which has been growing across the world for over 100 years, and they are now established in 18 regions across Aotearoa New Zealand.

Community Foundations build long-term, reliable funding streams for their local communities by investing and growing the donations they receive.

We exist to help nurture and build the prosperity of our region. We do this by connecting generous people with projects and causes they are passionate about.

Governed by a group of experienced volunteer trustees, we provide a trustworthy vehicle for you to contribute to the local causes that really matter to you. We provide the charitable framework, expert financial oversight and governance to ensure your giving generates the maximum good and creates an inter-generational legacy.

Secure your Trust's future

We were approached by the Dargaville Rotary Club, which managed the Hughes Trust Fund, about transferring the management of the Trust to Northland Community Foundation.

Six years after the initial transfer of \$69,412, its original value has increased by 11.2%. In addition, the Fund has given out \$10.7k in grants. These annual disbursements are paid out to the Dargaville Rotary Club to be distributed for charitable purpose within the Northern Wairoa region, as set out in the original intent of the Trust Fund.

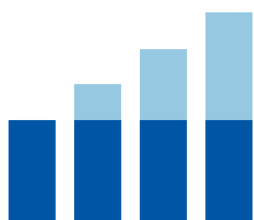
The growth in the Fund, while also making grants, shows the power and potential of our perpetual endowment model and why transferring your Trust might be right for you.

Together, we are building reliable long-term funding streams to support our community forever. Your donation is invested and grows over time to help our region and our community.

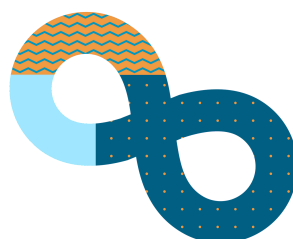
Northland Community Foundation understands that building healthy, vibrant communities requires long-term, sustainable support and resources. That's why we invest and grow the gifts we receive, however big or small, to create positive change in our region – both now and for generations to come.



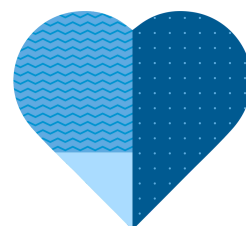
Your funds



*are invested
and grown*



*and the ongoing
income earned*



*goes back to your
Trust's causes*

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