



Investing for the Future Northland Environment Fund



Northland Community Foundation

Introducing our team

Jane Stearns

Mae Lewis

Leanne Wilson



About Us

- Our vision is for Te Tai Tokerau Northland to thrive through local generosity
- Since 2004, we've been dedicated to building a brighter future for everyone who calls this region home.
- We connect generous donors with meaningful causes, creating a sustainable legacy for our region.



How far have we come?



\$7M+

in **36** endowment
funds held in
perpetuity

\$7M



Distributed to Northland

since 2004



\$15M

in committed bequests
(promised funds)



29

committed bequests to
new and existing funds

38



grants made to
health projects



12.26%

Investment return on
endowment funds

2024-25



69

grants made to local
community projects



\$703k

distributed to
Northland

We live here and we love here,
we can help here.

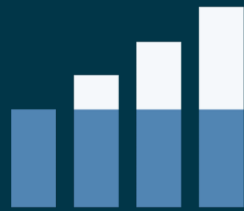


Endowment Funds

- By 30 September 2026 we will hold \$7.3M+ of Endowment Funds
- 3 Funds currently sit under the Northland Environment Fund:
Puketī Forest Trust, Bream Head Conservation Trust, Mountains to Sea Conservation Trust



Your gift



is invested
and grown



and the
ongoing income
earned



goes to the
local causes
you love.

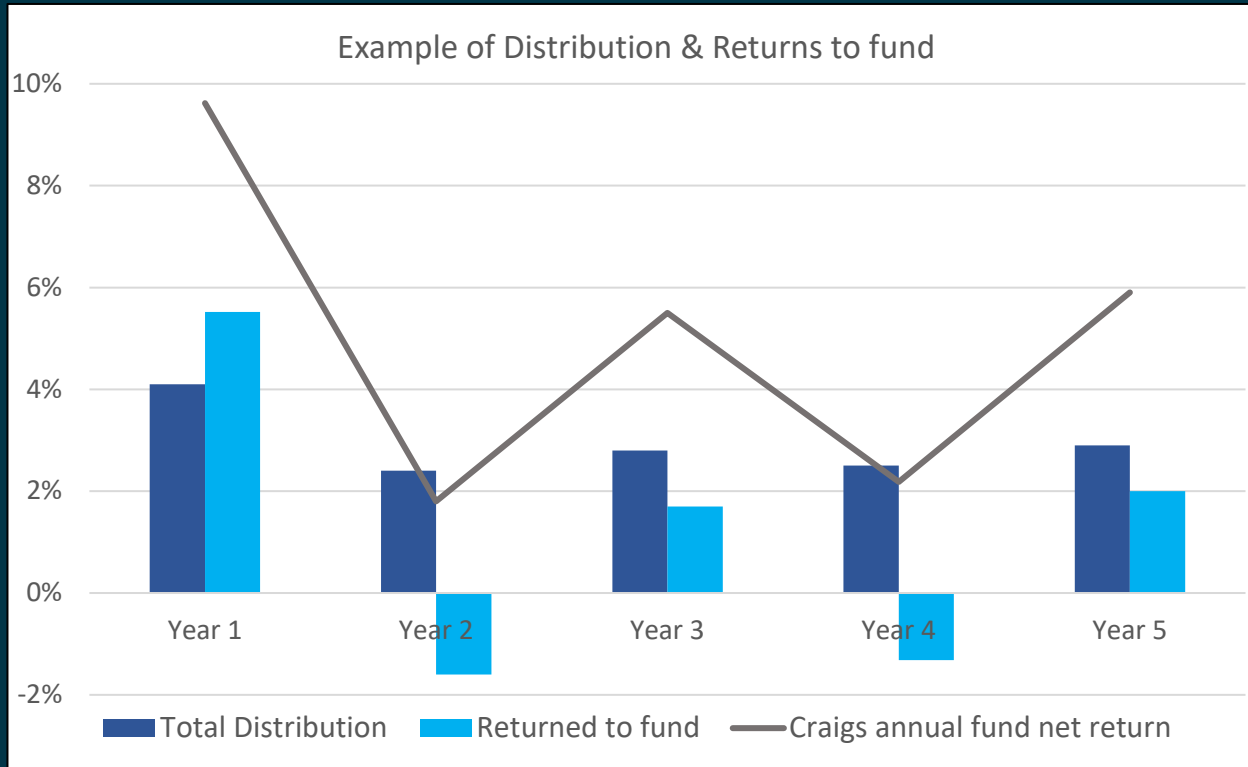


Northland Environment Fund



- Providing grants to projects forever
- Supporting restoration and protection of Northland's natural environments

Income and growth



- Annual distribution of 3-4% of the fund balance
- Remaining income is returned to the fund
- The fund, and the annual distribution, grows with inflation

An example

**2003 - The Edna Brown
Endowment Fund
established**

Original gift
\$67,200



First established with
a Fund balance of
\$67,200

**2021 - after
18 years**

Collective total
\$165,835



\$97,913
Fund balance + \$67,922
grants
distributed

**2033*- after
30 years**

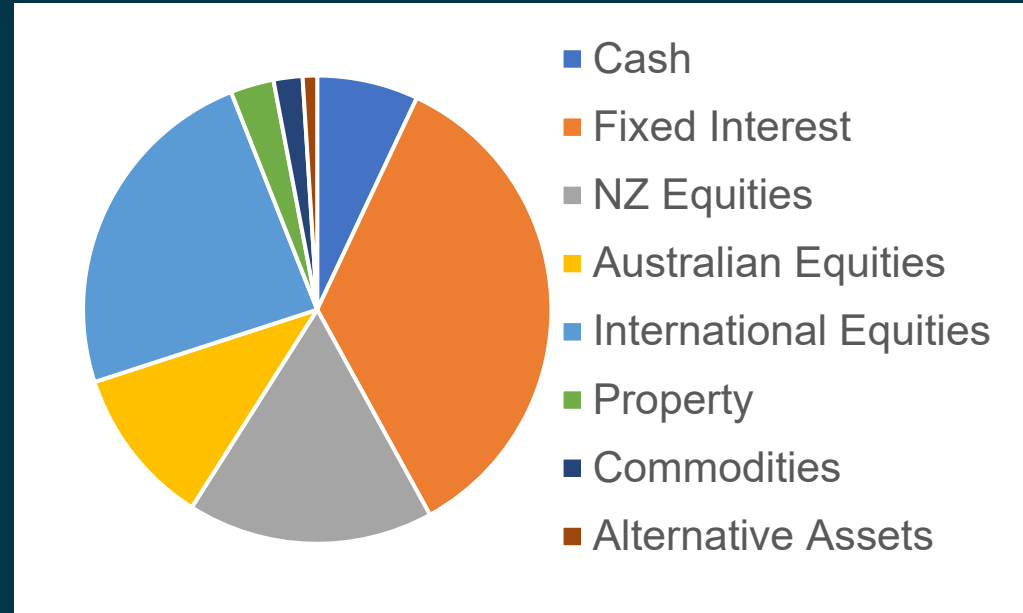
Collective total
\$231,486



\$118,211
Fund balance + \$113,275
grants
distributed

Our Investment Policy

- Balanced risk profile (asset allocation targeting 40% income, 60% growth)
- Broad diversification
- Investments meet generally accepted ethical and Environmental, social and governance (ESG) standards



Gifts in wills

- September is Wills month – consider your legacy for Northland
- If the Environment is your passion – could you leave a bequest in a Will for the Northland Environment Fund
- Loved ones and family first – 1%, 5% or more
- Add a legacy to your existing will

Introducing Rachel Ivess WRMK



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**Northland
Community
Foundation**

*forging brighter futures
through giving*

