

Helping Your Clients Make a Lasting Legacy.

A Guide for Professional Advisors

Supporting you and your clients

Raising charitable giving with your clients can deepen relationships and create something truly lasting. We know that some advisors feel unsure about how to begin, but when the time is right, it's one of the most significant opportunities you can create for your clients and for the community.

As the Top of the South Community Foundation (TSCF), we bring the local knowledge, philanthropic expertise, and administrative support to ensure every gift is personal, meaningful, and fulfilling.

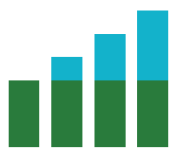
Top of the South Community Foundation

We exist to strengthen the long-term wellbeing of Te Taihū, ensuring that generosity given here continues to serve the community for generations. As a place-based foundation, we have deep local knowledge of the charities and organisations working across the region, and we support donors to give in ways that feel meaningful to them. Every donation is respected, protected, and carried forward with integrity. Since our establishment, we have distributed over \$1.4 million in grants to community organisations across Te Taihū.

How our unique giving model works



Your gift



is invested
and grown



and the
ongoing income
earned



goes to the
local causes
you love.

We raise funds through donations and gifts, invest them to generate ongoing income, and grow the capital to protect against inflation. The income earned is then distributed as grants to local charities and community organisations across Te Taihū, ensuring that every gift made today continues to make a difference, year after year, for generations to come.

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Top of the South
COMMUNITY FOUNDATION
Te Taihū

The Power of Endowment Giving.



CREDIT: NelsonTasman.nz & @barekivi

How your clients can give

Named Endowment Fund

A permanent fund in your client's name, directed to the charitable causes they choose. It's a simpler alternative to a private charitable trust - the same lasting legacy, without the legal complexity. Named Endowment Funds are typically established with a significant donation (e.g. \$150,000 - \$200,000 or more), made during your client's lifetime, through a bequest, or via a trust distribution.

Giving to a charitable purpose or specific organisation

For clients who want to support a particular cause or organisation, we offer a range of established funds covering areas such as health and wellbeing, youth and families, environmental sustainability, and the arts. There's no minimum contribution, making this an accessible option for clients at any stage of their giving journey.

Lifetime giving

Any donation made during your client's lifetime may qualify for a 33.3% tax credit. It's one of the most tax-effective ways your client can give, and every dollar stays working locally.

A gift of \$200,000 today could distribute more than \$523,000 to the community over 50 years, while around \$348,000 remains invested, still working for future generations.

What advisors are saying

"As both a lawyer and a TSCF Trustee, I've seen this from both sides of the table. Clients who are ready to think about their legacy need someone they trust to open the door, and they need confidence that what's on the other side is well governed and genuinely local. That's exactly what Top of the South Community Foundation offers." - Anissa Bain

We're happy to meet with you or join a client conversation. Get in touch to discuss how TSCF can support your clients and your practice.

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