



# Community Group Funds



Image: Great South

Setting up a Community Group Fund with the Southland Foundation is an effective way to provide a reliable and sustainable funding stream for the future.

## What is a Community Group Fund?

A Community Group Fund is a special type of endowment fund established solely for the benefit of your organisation. The Southland Foundation accepts the responsibility of managing the fund while your organisation has complete control over what to do with the income.

## How does it work?

- ✓ Your organisation establishes a fund with the Southland Foundation.
- ✓ The minimum required to set up a fund is \$100,000.
- ✓ Donations are pooled and invested in perpetuity.
- ✓ The Southland Foundation endeavours to protect the capital against inflation.
- ✓ Surplus income from investment is distributed back to your organisation for operational requirements.
- ✓ We work with your organisation to promote and grow the fund.

## Why is the Southland Foundation a good option?

- ✓ Donations from your supporters are pooled, so even small amounts add up quickly - and unexpected bequests are easily managed.
- ✓ Funds are professionally managed by leading investment advisors with robust governance from a board of appointed Trustees.
- ✓ We can assist with the promotion and marketing of your fund to existing and potential new donors.
- ✓ We are an independent and safe pair of hands. This provides confidence to your supporters that their gift will be protected and grown.
- ✓ Our low cost structure maximise funds available for distribution.

## How can your supporters contribute?

### ● Give today

Living givers can make a one-off donation or make regular contributions.

### ● Give tomorrow

Donors can leave a lasting legacy in their will to support your fund.

### ● Give what they can

As we pool donations from your supporters, every gift counts.

*Donations may qualify for a tax credit of 33.3%.*



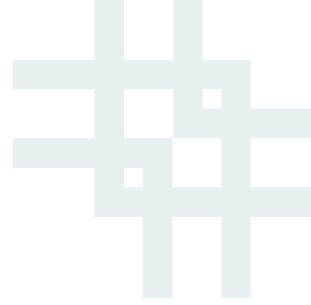
**SOUTHLAND**  
FOUNDATION

For information on starting a Named Endowment Fund, contact  
021 444 929 or [sarah@southlandfoundation.org.nz](mailto:sarah@southlandfoundation.org.nz)

[southlandfoundation.org.nz](http://southlandfoundation.org.nz)

Charities Registration #CC61897

# The Southland Foundation exists to assist you in making your own dreams for a better Southland reality.



## What is a Community Foundation?

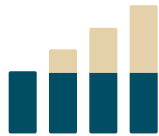
Community Foundations are local, independent, and not-for-profit. They run a well-proven model of giving which has been growing across the world for over 100 years, and they are now established in 18 regions in New Zealand. Community Foundations build long-term, reliable funding streams for their local communities by investing and growing the donations they receive.

## Southland Foundation

The Southland Foundation is Southland's Community Foundation. 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 believe in a better Southland for all, and see this being achieved through the power of giving. Through our smarter giving model any gift to the community is everlasting.



YOUR GIFT



IS INVESTED AND GROWN



AND THE ONGOING INCOME EARNED



GOES TO THE LOCAL CAUSES YOU LOVE.

## How our unique model works

- ✓ We raise funds from donations and gifts.
- ✓ We invest these funds retaining the capital and generating income.
- ✓ We grow the capital to protect against inflation.
- ✓ We use the remaining income to provide grants to causes that matter most to you. This could be for a purpose or a specific group of charities.

## FAQ's

**Q. Do you have to be a registered charity to start a Community Group Fund?**

**A. No, any community group or society can start a fund. However, all distributions must be spent on a charitable purpose.**



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