



# Transfer a Trust



The Southland Foundation offers simple, flexible and efficient solutions for the settlement of charitable or family trusts.

## What is a Trust Transfer?

A trust transfer or trust resettlement is a very simple way to wind up a trust while still maintaining the original purpose and legacy of the Trust.

Operating a trust or charity has been 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, but they realise they can't continue in their current structure. A trust transfer through the Southland Foundation may be the answer.

## How does it work?

- ✓ Your trust or organisation sets up a Named Fund with the Southland Foundation. The name of this could be similar to your current name or something new.
- ✓ You set the purpose of the new fund, which would most likely align with your original purpose.

- ✓ You decide on a distribution method. This may be through our existing distribution committee or through your own bespoke committee.
- ✓ The Southland Foundation takes care of the governance, charity reporting, distributions, finance, and marketing.
- ✓ Your fund will be pooled with our other invested funds managed by professional advisors.
- ✓ A portion of the income is distributed each year to the community.
- ✓ The Southland Foundation produces annual reports of returns and distributions.

## Why is the Southland Foundation a good option?

- ✓ Funds are professionally managed by leading investment advisors with robust local governance from a board of appointed Trustees.
- ✓ Economies of scale lead to lower costs than running a private charitable trust.
- ✓ We are an independent and safe pair of hands.
- ✓ All donations provide enduring support to local charities and causes in Southland, ensuring that you can give where you live.
- ✓ The Southland Foundation can assist you to maximise the impact of your gift.
- ✓ Our low-cost structure.



**SOUTHLAND**  
FOUNDATION

For more information about transferring a trust to the Southland Foundation, contact **021 444 929** or [robyn@southlandfoundation.org.nz](mailto:robyn@southlandfoundation.org.nz)

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

Charities Registration #CC61897

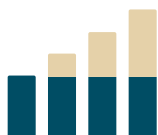
# The Southland Foundation exists to assist you in making your own dreams for a better Southland reality.

## 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.



YOUR GIFT



IS INVESTED AND GROWN



AND THE ONGOING INCOME EARNED



GOES TO THE LOCAL CAUSES YOU LOVE.

## 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.

## 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. How are the funds invested?**

**A.** We use a professional fund manager overseen by an independent investment committee.

**Q. Do the distributions stay local?**

**A.** Yes, all the distributions are for the benefit of Southland, or if desired a specific area within Southland.



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