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# Improve client relationships with philanthropy

**Perpetual Private**

**Cat Fay, Managing Partner**

**Community, Social Investments & ESG**

**October 2022**

Trust is earned.

Perpetual 



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## Hidden History of Australian Philanthropy



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## Driving 50 years of advances in biomedical research



**RAMACIOTTI**  
SUPPORTING BIOMEDICAL RESEARCH

Established in  
1970 with

**A\$6.7**  
million

Now worth over

**A\$70.6**  
million\*

Distributed since  
establishment

**~A\$64.1**  
million

\*As at February 2022

# Why it matters, why it works

## The Miles Franklin Literary Award



A bequest set up in  
1954 worth the  
equivalent of

**\$17,500**

Today has given away more  
than

**\$1.3 million**

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## From little things, big things grow

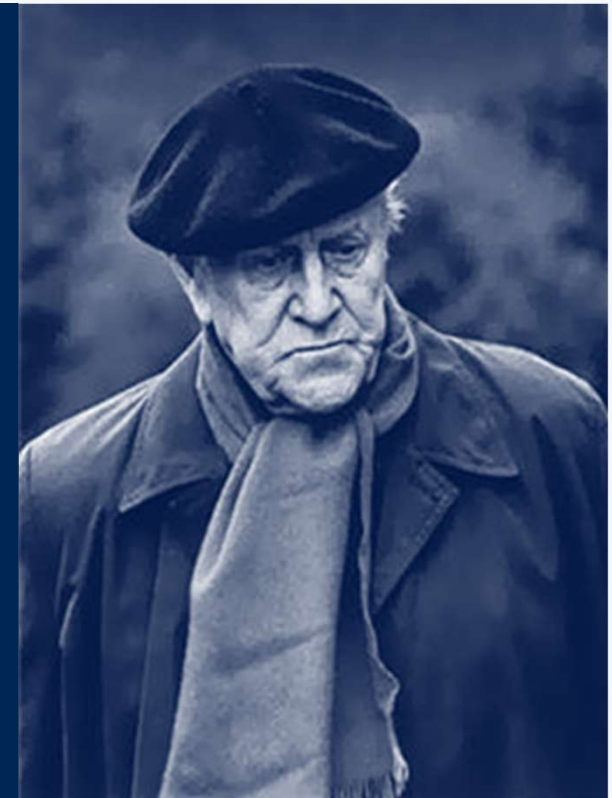
### Patrick White Literary Award

**A\$80,000**  
placed in Trust in 1974

Now valued at over  
**A\$848,000\***

**A\$941,500**  
paid in distributions for  
**48** awards

\*As at February 2022



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## Types of clients to raise philanthropy with

The following are key trigger events where philanthropy might be front of mind for your clients:



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**Sale of  
business or  
windfall event**



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**Major tax event  
(including CGT  
concerns)**



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**Estate  
planning**



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**End of year tax  
planning**

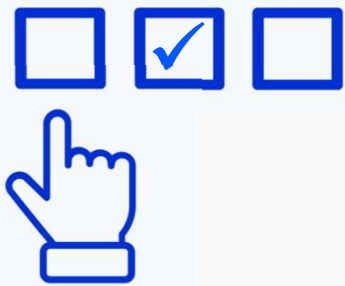


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**Retirement**

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## Which structure?



**Public  
Ancillary Fund  
(PuAF)**

**“The Perpetual  
Foundation  
Endowment”**

**Private  
Ancillary Fund  
(PAF)**

**Private  
Charitable  
Trust**

# Private Ancillary Funds (PAF)



## Advantages & considerations

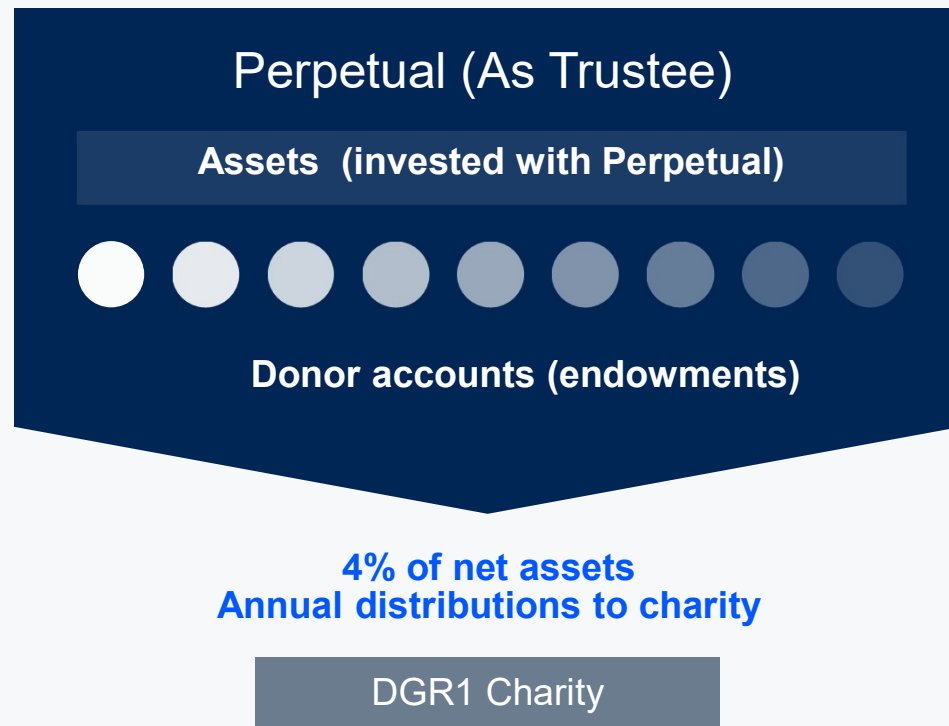
- Allows businesses, families and individuals to make tax deductible contributions to foundation of their own without the obligation of fundraising
- Donations can be spread over five years
- Donors have control over investments and which charities receive benefit
- Find causes, charities and projects that match your clients interests and passions
- Annually - must distribute \$11,000 or 5% of net assets (whichever is greater)



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## Public Ancillary Fund (PuAF)

Perpetual Foundation - Endowment



### Advantages & considerations

- A simple and flexible sustainable giving option
- Donors can recommend charities to benefit
- No administration and compliance burden
- Same tax advantages as a PAF
- Perpetual can find causes, charities and projects that match your clients interests and passions
- Diversified, pooled investment strategy
- Ancillary funds (giving not doing)

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# Thank you for your attention

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