
Perpetual Foundation Endowments

**Create
something
remarkable**

Trust is earned.

Perpetual 



You've spent a lifetime making a difference

It's one of the ways many people define success, whether in a career, raising a happy family or simply feeling they've made the world a better place.

A Perpetual Foundation endowment allows you to continue making a difference now, and long after you're gone.

It's an opportunity to keep up the good work.

To create something remarkable.

Loving, living and giving

A person's motivations for giving tend to fall into four broad categories. Whatever your reasons, planning your giving with Perpetual can help you make a lasting difference, within an effective, efficient and time-tested structure.

Rational

You like the idea of planning your legacy and may want to structure your current giving to make more of an impact, either during your lifetime or through your will.

Emotional

You have causes you're passionate about, and you share them with your family. These causes might be motivated by a major life event or a health concern.

Financial

You may experience a windfall event with tax implications, such as the sale of a business, property or other asset. Philanthropy can form part of a tax effective solution.

Practical

If you find it hard to juggle your current giving or community involvement, you might like a more structured, less time-consuming way to give.

Empowering for the future



“It’s my goal that as a family we can acknowledge all the blessings and opportunities we have been given in life and reach out, albeit in a very small way, to people less fortunate than us.”

The Lavers’ family story

Chris Lavers set up an endowment within the Perpetual Foundation to help improve people’s incomes and quality of life. Working with some of Africa’s poorest communities, Chris supports micro-enterprises that allow people to become self-sustaining. These “Livelihood Programs” provide communities with access to capital and hands-on business training, empowering them to start small businesses. “With greater incomes, people have more choices that should put them one step ahead of the daily challenge to put food on their tables” says Chris.

Giving in a structured way

Before establishing his endowment, Chris had been giving directly to charity and found there was limited follow-up. “What appealed to me most was the structure that Perpetual offered. Now that we give in a more measured way, the organisations we support know they’re not going to be left in the lurch. Perpetual introduced us to organisations that aligned with the kind of work we wanted to support. Their process of ensuring the beneficiary has to be accountable and submit robust financials gave us some comfort on how the money was being spent – we could see they were doing good things.”

Involving family

Chris encourages people thinking about philanthropy to get their family involved as well. “You can look at it in terms of a financial contribution or you can get closely involved with mentoring, guidance and support. We started off with financial support and ended up with hands-on involvement on the ground in Africa. I think it’s been really important to expose our kids to the hardships others endure. On Sydney’s northern beaches, a typical kid’s hardship is an iPad malfunction. We’re keen to help our children put their ‘hardships’ in perspective and realise for many people that means not eating or not having clean water to drink.”

Chris has a clear objective for the family. “It’s my goal that as a family we can acknowledge all the blessings and opportunities we have been given in life and reach out, albeit in a very small way, to people less fortunate than us.”

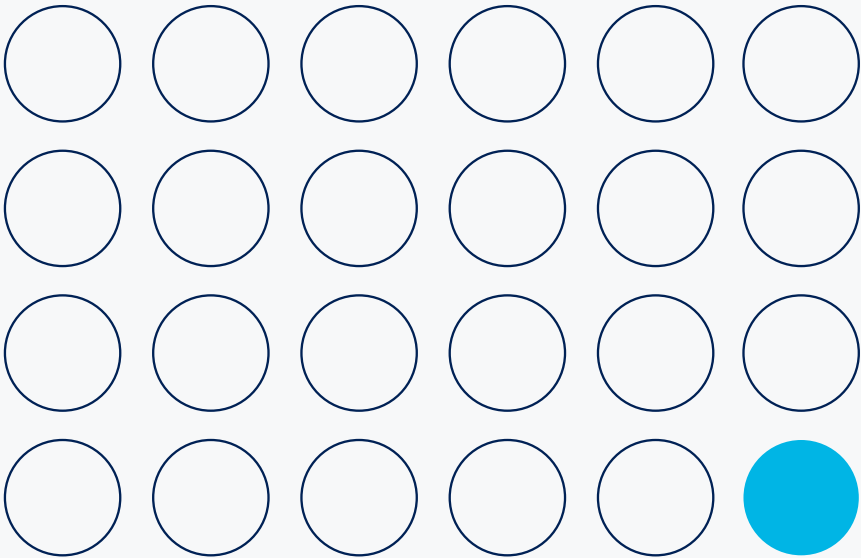
Structured giving lets you plan when, where and how funds are invested for a more sustainable outcome. It also allows you to donate well into the future.

How an endowment with Perpetual works

When you establish an endowment with Perpetual, it's created within an existing trust structure called the Perpetual Foundation. The Perpetual Foundation is a public ancillary fund, meaning individuals, families and companies can set up named endowments within it, without having to worry about individual compliance, investment and trustee responsibilities.

Endowments within the Perpetual Foundation are invested together within an investment strategy that is designed for the needs of charitable funds. Income is generated, with a percentage of the net assets distributed annually to the eligible charities you request.

The Perpetual Foundation



Your individual endowment



Your individual endowment sits within the Perpetual Foundation, an existing public ancillary fund.



Perpetual, as trustee of the Perpetual Foundation, looks after the compliance, investment and administration of your endowment.



Charities and causes your endowment can support may fit within, but are not limited to:



Community wellbeing



Health



Arts and culture



Animal welfare



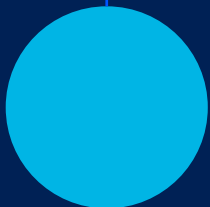
Medical research



Education



Conservation and environment



Annual grants from your endowment are given to eligible causes you request.



Over time, your endowment grows. It can also exist in perpetuity, meaning it can always support the causes you are passionate about.



Why set up an endowment?



Fast

An endowment can be established within a matter of days during your lifetime. The minimum initial donation is \$20,000 and the minimum for each additional donation is \$5,000.



Impactful

Perpetual can work with you and your family to help make the most of your endowment's positive impact. We offer research and advice on your areas of interest, not-for-profit organisations or specific projects you'd like to support.



Tax effective

Your donations are generally tax deductible and deductions can be spread over a period of up to five years. There can also be capital gains benefits to making donations via your estate.



Enduring

Your endowment can provide timeless support to charitable causes over generations. Your friends, family and colleagues can contribute and you can see your endowment grow over time.



Easy

Perpetual handles all the administration, compliance, investing and reporting so you can concentrate on the giving.



Secure

As one of Australia's oldest and largest trustee companies, Perpetual has extensive experience and understanding in the area of philanthropic giving.



Involving

You can recommend the areas, organisations, or specific projects you would like your endowment to support and you can change your recommendations every year.

From the heart



The Myrven and Judith Muir Memorial Endowment

The Myrven and Judith Muir Memorial Endowment was established to support cardiac medical research. Myrven, known widely as Dick, created the endowment to honour the wishes of his late wife Judith, whose mother died of a hole in the heart.

In 2009, Dick set up the endowment as their legacy, dedicated to supporting heart research at The Prince Charles Hospital in Brisbane, where Judith had spent her career as a medical typist. He decided that an endowment within the Perpetual Foundation was the right option because it would be professionally managed while still giving him

oversight as to where the money was spent.

Initially, Dick intended to establish the endowment through his will. However, with the encouragement of his niece Nerida, he set it up during his lifetime. "Uncle Dick was happy to see how the endowment worked while he was still with us. He was very impressed with its performance and loved seeing how the money was being used for the cause he was passionate about" says Nerida. He liked hearing from The Prince Charles Hospital Foundation about what the funding was going towards and, as a policeman for most of his working life, he took

great pleasure in investigating the detail of the research projects."

Although Dick started the endowment with an initial donation of \$50,000, with the help of his Perpetual adviser he made an additional tax deductible donation each year.

By including donations to the endowment as part of his annual tax planning, Dick was not only able to reduce his tax liability but also grow the balance of the endowment and provide more funding towards the cause that was so important to him and his wife.



Annual grants to The Prince Charles Hospital Foundation from the Muirs' endowment provide consistency of funding that allows researchers to build momentum in their work, leading to faster medical discoveries. Michael Hornby, The Prince Charles Foundations's CEO says "With sustainable funding from the endowment, we're able to retain the best researchers and give them the security they need to carry out their life-saving work. The Muirs' generosity gives our researchers an element of security in a field that struggles for ongoing funding.

"For patients, the research that is funded at The Prince Charles Hospital has an impact on them directly. Recently, Bec Craven found out she was suffering from end stage heart failure and would need a transplant to make it to her

24th birthday. Thanks to the work being carried out on campus, Bec was able to have a mechanical heart device implanted, which allowed her the crucial time she needed to wait for the right donor heart."

Dick passed away in 2016 and left the majority of his estate to the endowment. The Myrven and Judith Memorial Endowment now sits at \$4,800,000. It has granted more than \$480,000 (as at May 2020) to helping tackle heart disease so far and will continue to support cardiac research well into the future.

[Perpetual Foundation endowments can be set up during your lifetime while you can see the impact of your generosity or they can form part of a legacy through your will.](#)

You can request who benefits from your endowment

Deciding on your gifting strategy can be one of the most rewarding and challenging parts of giving. We can work with you and your family to prioritise areas for giving and provide information on best practice thinking in your areas of interest. When you establish your endowment, you can recommend the charity or community organisations that you wish to benefit, and change that recommendation annually. You can nominate areas of interest, organisations or specific projects you'd like your endowment to support.

Eligible organisations

To be eligible to receive a grant, an organisation must be both income tax exempt and an 'Item 1' Deductible Gift Recipient (DGR), which is an organisation that is entitled to receive income tax deductible gifts. If the organisation is a registered charity, they must not have any enforcement actions against them from the regulator (Australian Charities and Not-for-profits Commission). Perpetual can review any preferred beneficiary you request and let you know if they are eligible.

Areas of interest

You don't need to request specific organisations but you can provide a general recommendation as to

the type of beneficiary, for example, medical research, the environment, the arts or a geographical region of focus.

A general charitable purpose

One granting option is to nominate a 'General Charitable Purpose' which means distributions can be directed to a broad range of charities and activities. Perpetual has extensive experience dealing with charitable and other community organisations and we can match your philanthropic interests with their needs.

We conduct our own research using our extensive network in the philanthropic sector.

A thorough process of matching needs with generosity

Our annual grant process involves reviewing detailed funding applications from charities and community organisations all over Australia and matching them to our clients' charitable wishes. This process places great emphasis on the quality of the applicant organisations' leadership, governance and ability to achieve their objectives. You can choose to use this service to give you confidence that the organisations you request are in a good position to use your funds for maximum impact and benefit.

Stepping through the process of setting up an endowment

1. Decide

- Consider the charities and issues that are important to you. You can use the Endowment Establishment Form on page 22 of this brochure to help you with this
- Decide how you'd like to give – now, through your will, or both

2. Set up

- Complete the Endowment Establishment Form on page 22 or speak with a Perpetual philanthropy specialist who will help you fill out the form. Call 1800 501 227 to arrange a time
- We'll set up your endowment, usually within a matter of days
- You'll receive bank account details for your endowment which will enable you to make donations at any time

3. Connect

- You'll receive articles and insights on important issues for philanthropists and the not-for-profit sector
- Our philanthropy specialists will contact you annually about your recommended charities or areas of interest
- You'll receive annual statements showing endowment performance, donations and distributions to your recommended charities or areas of interest

4. Manage

- We'll manage all compliance, investment and reporting obligations
- We'll arrange annual distributions to your eligible recommended beneficiaries

If you have any questions at all, call us on 1800 501 227 or email foundation@perpetual.com.au
We're here to help every step of the way.

What you need to know to get started

Frequently asked questions

Set up

Who can set up an endowment?

Individuals (solely or jointly) who are over 18 years of age, companies, trusts, estates and other entities including associations, clubs and charities, are all eligible to establish an endowment.

How do I apply?

Simply complete the Endowment Establishment form, instructions can be found on page 21 of this brochure.

Can I name the endowment?

You can request a name for your endowment on the Endowment Establishment form. This can be your name, your family name, the name of a business or association, words describing your chosen focus area or in memory of someone (note that the name may be subject to a character limit).

Can I remain anonymous?

All grants made to eligible organisations attributed to your donations will acknowledge the name of the endowment unless you have requested anonymity. Most charitable organisations like to provide information to donors and may invite you to become involved in their programs and events. Payments to beneficiaries are generally made via electronic

funds transfer. Should you wish to remain totally anonymous, Perpetual can issue a cheque to your beneficiary on your behalf, however, a bank fee will apply.

Donations

What is the minimum initial donation?

The minimum initial donation is \$20,000.

How do I make the initial donation?

You may make your initial donation by cheque attached to the Endowment Establishment form or by electronic funds transfer to your endowment's dedicated bank account details. We will email you the account details as soon as the endowment is established. We will send you a receipt for income tax purposes once your donation has been accepted.

How do I make additional donations?

The minimum additional donation is \$5,000. You will receive your own dedicated endowment bank account details to allow you to make additional donations at any time. Once you make a donation, simply email us your endowment name and donation details and we'll send you a tax receipt. You can also choose to make additional donations via cheque.

Can I donate non-cash assets?

You can donate non-cash assets to the Perpetual Foundation, for example, shares, real estate, or other securities as long as they are valued at over \$5,000. The assets may need to be valued by the Australian Taxation Office, which we can arrange.

Can I withdraw funds after the endowment has been set up?

Once the endowment is established, any donations received are irrevocable and not refundable. They are held by the Trustee of the Perpetual Foundation and can only be granted in keeping with the Deed of Trust and the Public Ancillary Fund Guidelines 2011.

Grants

How much is distributed, and when?

Each financial year, the Perpetual Foundation must distribute at least 4% of the market value of its net assets (as at the end of the previous financial year).

Annual grants are normally made shortly before the end of each financial year from the income received during that year. In some cases, to meet the minimum distribution requirements, some capital might also be distributed.

Grants

How many organisations can I support?

You may recommend a number of beneficiaries based on the value attributed to the endowment.

| Value of your endowment | Maximum number of grant recipients |
|-------------------------|------------------------------------|
| Up to \$50,000 | 2 |
| \$50,001 – \$100,000 | 4 |
| \$100,001 – \$500,000 | 6 |
| \$500,001 – \$2,000,000 | 8 |
| Over \$2,000,000 | 10 |

Who ensures the organisations I wish to support are eligible?

Before making a grant, Perpetual will check that the organisation is eligible to receive funds, is appropriately registered and has no enforcement actions from the regulator.

Can I change the organisations I support?

You may change your grant recommendations each year by emailing foundation@perpetual.com.au or by speaking with a Perpetual philanthropy specialist on 1800 501 227.

Tax considerations

What are the tax benefits of an endowment?

When you set up an endowment within the Perpetual Foundation you may be entitled to a range of tax benefits. We can help you make the most of the tax

efficiencies available, taking into account your personal financial situation, or you may like to discuss this with your accountant.

Are donations tax deductible?

Yes, cash donations are generally deductible up to the limit of your taxable income.

Deductions for donations can be spread over a period of up to five years.

What are the tax implications of non-cash asset donations?

Donations of non-cash assets that you have owned for less than 12 months are generally tax deductible for an amount equal to the lesser of the market value of the assets when the donation is made, or the amount you paid for the assets.

Donations of non-cash assets, which you have owned for longer than 12 months, are generally eligible to be claimed as tax deductions for the value of the assets as determined by the Commissioner of Taxation.

You may spread deductions in respect of donations of non-cash assets over a period of up to five years. This may be useful since donations generally are only deductible up to the limit of your taxable income in the year you make the donation. If you are considering donations of non-cash assets, in particular, you should obtain professional tax advice.

Giving after you pass away

Can I include the endowment specifically in my will and what are the tax implications?

Yes, you can establish or nominate your Perpetual Foundation endowment in your will to receive the residuary or a specified amount of your estate. Assets distributed from your estate to the Perpetual Foundation may be exempt from capital gains tax. You should obtain professional legal advice if you are considering providing a bequest from your estate. Perpetual can connect you to an appropriate legal firm to draft your will and we can work with you and your solicitor to ensure the clause is correctly worded.

Can my endowment continue after I pass away?

Yes, you may wish to nominate a family member, friend or other representative as your successor to make grant recommendations after you pass away, or in the event that you suffer mental incapacity or another legal disability.

If your endowment account has a balance of at least \$20,000, your nominated successor can continue to make grant recommendations after you pass away. If an endowment balance falls below \$20,000, we may merge it with another endowment or grant the balance to eligible organisations and close the account. To nominate a successor, simply complete the 'successor nomination' section in your Endowment Establishment Form or advise us in writing. We may require your nominated successor to sign an acknowledgement as to the terms of operation of the Perpetual Foundation as set out in this brochure and the Deed of Trust.

Fees and costs

Establishment of an endowment and donations

There are no fees for establishing an endowment or making donations.

Trustee fee

The trustee fee as at the date of this brochure is 0.70% p.a. of the balance attributed to an endowment. This fee is set to cover the costs associated with administering your endowment as part of the Perpetual Foundation, including all aspects of the granting process, research and evaluation of eligible organisations receiving grants. The only additional charge is a fee to comply with requirements of the Australian Charities and Not for Profit Commission (ACNC) and Australian Taxation Office (ATO).

The financial services guide is available at www.perpetual.com.au/fsg

Investment management costs

Your endowment will be invested with the aim of providing income for annual distributions while growing your endowment so it can exist in perpetuity.

As at the date of this brochure, the Perpetual Foundation invests in the Perpetual Charitable Endowment Fund, a registered managed investment scheme with Perpetual Investment Management Limited (PIML) as its responsible entity. Management fees received by PIML and estimated indirect costs are detailed in the current product disclosure statement for the Perpetual Charitable Endowment Fund. The product disclosure statement and target market determination for the Perpetual Charitable Endowment Fund are available at www.perpetual.com.au/pcef-funds-updates or by contacting us.

Other service providers

There may be occasions where the Perpetual Foundation is required to engage other service providers, such as a registered tax agent, auditor or external legal adviser. In these instances, the costs will be allocated to the relevant endowment or shared equitably across all accounts within the Perpetual Foundation, as appropriate in the circumstances. These service providers may be a related party to Perpetual.

Important notes

This information brochure (issue 9, September 2021) describes the arrangements for establishing an 'endowment' within the Perpetual Foundation ABN 41 069 508 398 (the Foundation). It also details policies, procedures and benefits associated with establishing an endowment, based on your donations, the share of investment returns and grants attributed to it.

References in this brochure to 'we', 'us', 'our', 'Perpetual', and 'Trustee' are to Perpetual Trustee Company Limited as the Trustee of the Foundation and the Advisory Committee of the Foundation.

Perpetual Trustee Company Limited ABN 42 000 001 007, AFSL 236643 is a wholly owned subsidiary of Perpetual Limited ABN 86 000 431 827.

'Perpetual Group' means Perpetual Limited and its subsidiaries.

References to 'you' and 'your' are to prospective donors.

Perpetual Investment Management Limited ABN 18 000 866 535, AFSL 234426, which is also a wholly owned subsidiary of Perpetual Limited, may be the responsible entity of the underlying managed investment scheme that the Foundation invests in. This brochure is not a product disclosure statement and does not constitute an offer to invest in the underlying investments of the Foundation. It contains general information only and is not intended to provide advice or take into account personal objectives, financial situation or needs. The information is believed to be accurate at the time of compilation and is provided by the Trustee in good faith.

All activities of the Foundation and donor participation in the endowment are subject to the terms and conditions contained in the Foundation's Deed of Trust and this brochure, as updated from time to time. The Trustee can modify the terms of the Foundation at any time according to the Deed of Trust. We will send you a copy of the Deed of Trust on request.

We have discretion to accept, limit or refuse any donation.

The tax information contained in this document is general in nature and is not tax advice and should not be relied on as such. We recommend you obtain professional tax advice regarding your donations.

All amounts in this brochure are in Australian dollars and all times quoted are Sydney time (unless otherwise specified).

Unless otherwise stated, all fees and other costs disclosed in this brochure are inclusive of the net effect of goods and services tax.

Privacy

Privacy Information

We collect personal information about you from your Endowment Establishment Form to establish and support the ongoing administration of an endowment and to advise you of new developments relevant to the Perpetual Foundation or other Perpetual products. If you do not provide us with your relevant personal information, we will not be able to process your Endowment Establishment Form or administer an endowment for you.

Disclosure

We may disclose your personal information to Perpetual's related entities or service providers that perform a range of services on our behalf in relation to grants attributed to your donations (for example, providers of printing or postal services) and which may be located overseas. We may disclose your personal information

to the charitable or community organisations that are recipients of grants attributed to your donations unless you have requested anonymity or you have requested us not to do so. We also disclose information about the endowment to the adviser whose name appears on your Endowment Establishment Form, unless you have requested us not to do so. Otherwise, we will not disclose your personal information to any other external parties unless required by law.

Privacy Policy

Privacy laws apply to our handling of personal information and we will collect, use and disclose your personal information in accordance with our Privacy Policy, which is publicly available at our website www.perpetual.com.au/privacy-policy or you can obtain a copy free of charge by contacting us.

Establishing Your Endowment

To establish an endowment please complete the form in this brochure or online at www.perpetual.com.au/endowmentform and return it to us in one of the following ways:

- with your financial adviser
- email us at foundation@perpetual.com.au
- print and mail the form to:

Perpetual Foundation Endowments Philanthropic Services GPO Box 4172, Sydney, NSW 2001

Further assistance

If you require any further information about Perpetual Foundation endowments, or would like assistance completing the form, please call us on 1800 501 227 during business hours.

| DONOR TYPE | SECTIONS TO COMPLETE | WHO SHOULD SIGN |
|---|----------------------|--|
| I – Individual | | |
| Sole individual | 1A | Individual |
| Joint individuals | 1A and 1B | Both individuals |
| C – Company | 1C | For a company: Two directors or A director and secretary or If the company has a sole director/secretary (please also tick the box above the applicant’s signature in section 5), by that person or a representative authorised by the company. Companies can also sign under power or attorney. |
| P – Partnership | 1A, 1B* and 1D | Partner(s) |
| T – Trust | | |
| Individual trustees | 1A, 1B* and 1D | If more than one trustee, all trustees should supply their details and sign. |
| Corporate trustees | 1C and 1D | See ‘Company’ above. |
| O – Other entity (unincorporated association, club, charity) | 1A, 1B* and 1D | Office bearer(s) – if more than one office bearer, all office bearers should supply their details and sign. |

* Complete this section if more than one donor.

Endowment Establishment Form

1. Donor details (must be completed)

| | | | | | |
|-------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Donor type (please tick one): | individual | company | partnership | trust | other |
| | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

1A. Donor 1 – Please tick one:

| | | | | | | | | | | | | | | | | | |
|---------------------------------|----------------------|--------------------------|----------------------|--------------------------|----------------------|--------------------------|----------------------|--------------------------|----------------------|--------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|--|
| title | Mr | <input type="checkbox"/> | Mrs | <input type="checkbox"/> | Miss | <input type="checkbox"/> | Ms | <input type="checkbox"/> | other | <input type="checkbox"/> | date of birth | <input type="text"/> | / | <input type="text"/> | / | <input type="text"/> | |
| first name(s) | <input type="text"/> | | | | | | | | | | | | | | | | |
| last name | <input type="text"/> | | | | | | | | | | | | | | | | |
| residential address (mandatory) | <input type="text"/> | | | | | | | | | | | | | | | | |
| suburb | <input type="text"/> | | | | | state | <input type="text"/> | | | | | postcode | <input type="text"/> | | | | |
| postal address (optional) | <input type="text"/> | | | | | | | | | | | | | | | | |
| suburb | <input type="text"/> | | | | | state | <input type="text"/> | | | | | postcode | <input type="text"/> | | | | |
| phone (home) | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | phone (business hours) | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| mobile | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | | | | | | | | | | | | |
| email | <input type="text"/> | | | | | | | | | | | | | | | | |

1B. Donor 2 – Please tick one:

| | | | | | | | | | | | | | | | | | |
|---------------------------------|----------------------|--------------------------|----------------------|--------------------------|----------------------|--------------------------|----------------------|--------------------------|----------------------|--------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|--|
| title | Mr | <input type="checkbox"/> | Mrs | <input type="checkbox"/> | Miss | <input type="checkbox"/> | Ms | <input type="checkbox"/> | other | <input type="checkbox"/> | date of birth | <input type="text"/> | / | <input type="text"/> | / | <input type="text"/> | |
| first name(s) | <input type="text"/> | | | | | | | | | | | | | | | | |
| last name | <input type="text"/> | | | | | | | | | | | | | | | | |
| residential address (mandatory) | <input type="text"/> | | | | | | | | | | | | | | | | |
| suburb | <input type="text"/> | | | | | state | <input type="text"/> | | | | | postcode | <input type="text"/> | | | | |
| postal address (optional) | <input type="text"/> | | | | | | | | | | | | | | | | |
| suburb | <input type="text"/> | | | | | state | <input type="text"/> | | | | | postcode | <input type="text"/> | | | | |
| phone (home) | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | phone (business hours) | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| mobile | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | | | | | | | | | | | | |
| email | <input type="text"/> | | | | | | | | | | | | | | | | |

1C. Company – (if applicable)

| | |
|--------------|----------------------|
| company name | <input type="text"/> |
|--------------|----------------------|

1D. Entity – If you are establishing this endowment on behalf of another entity (ie, trust/estate/partnership/unincorporated association), please complete this section. Enter trustee name(s) in 1A, 1B or 1C (above).

| | |
|-------------|----------------------|
| entity name | <input type="text"/> |
|-------------|----------------------|

Perpetual contact person (if applicable)
 eg. financial adviser or philanthropy specialist:

| |
|----------------------|
| <input type="text"/> |
|----------------------|



2. Endowment details (must be completed)

Requested name of endowment – For example, The Citizen Family

The terms ‘fund’, ‘sub-fund’, ‘trust’ or ‘foundation’ should not be included in the endowment name.

Endowment

3. Initial donation (must be completed)

Initial minimum donation \$20,000 – EFT details will be provided for your endowment to make an initial and/or ongoing donations. A tax receipt will be provided via email.

donation \$

Please note that special procedures apply to donations of non-cash assets. Donors considering donations of non-cash assets or other property should contact Perpetual on 1800 501 227.

4. Grant requests – annual distribution of grants (optional)

If you know which specific charitable or community organisation(s) you prefer to receive grants attributed to this endowment, please include in the box below (optional). We can work with you to identify organisations that align with your charitable objectives if you would like assistance.

Note: Your endowment is not required to make a distribution in the first financial year of establishment (but you can if you wish).

Please select your areas of interest (optional)

| | | | |
|--|--|---|---|
| animal welfare <input type="checkbox"/> | arts & culture <input type="checkbox"/> | conservation & environment <input type="checkbox"/> | education <input type="checkbox"/> |
| civil rights, law & justice <input type="checkbox"/> | health & medical research <input type="checkbox"/> | international development <input type="checkbox"/> | social & community wellbeing <input type="checkbox"/> |

Grants are accompanied by a letter which may include the endowment name, unless we are otherwise notified.

Would you like the name of your endowment to remain private?

yes no (if no selection marked ‘no’ will be assumed)

5. Successor nomination (optional)

Indicate below the details of the person you nominate to take over grant recommendations after you die, or in the event you suffer mental incapacity or other legal disability. We may require your successor nominee to sign an acknowledgement such as the one in part 6 below.

| | | | | | | | | | | | |
|----------------|-----------------------------|------------------------------|-------------------------------|-----------------------------|--------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| title | Mr <input type="checkbox"/> | Mrs <input type="checkbox"/> | Miss <input type="checkbox"/> | Ms <input type="checkbox"/> | other <input type="checkbox"/> | date of birth | <input type="text"/> | / | <input type="text"/> | / | <input type="text"/> |
| first name(s) | <input type="text"/> | | | | | | | | | | |
| last name | <input type="text"/> | | | | | | | | | | |
| postal address | <input type="text"/> | | | | | | | | | | |
| suburb | <input type="text"/> | | | | state | <input type="text"/> | | postcode | <input type="text"/> | | |
| phone (home) | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | phone (business hours) | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| mobile | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | | | | | | | |
| email | <input type="text"/> | | | | | | | | | | |

6. Acknowledgement and donor signature(s) (must be completed)

- I/We have read the Perpetual Foundation Endowments Brochure and agree to be bound by the provisions of the Perpetual Foundation’s Deed of Trust and any other additional terms and conditions contained in this brochure.
- I/We understand that any donation once accepted by the Trustee represents an irrevocable donation to the Perpetual Foundation and is not refundable to me/us.
- I/We certify that I/we, or my/our ‘associate’ will not receive any benefit, directly or indirectly, from the charitable or community organisations recommended to receive grants from my/our endowment.
- I/We understand that the Trustee decides which eligible organisations will benefit from each endowment and is under no obligation to follow my/our recommendation.
- I/We agree that information about this endowment may be disclosed to my/our adviser unless I/we have ticked the box to the right.
- I/We agree to Perpetual sending me/us insights, articles and event invitations relating to philanthropy and other Perpetual Private services. I/We can opt out at any time.

Please tick if applicable: I am the sole director and sole secretary of the company.

| | | | | | | | |
|-----------|----------------------|------|----------------------|---|----------------------|---|----------------------|
| signature | <input type="text"/> | date | <input type="text"/> | / | <input type="text"/> | / | <input type="text"/> |
| signature | <input type="text"/> | date | <input type="text"/> | / | <input type="text"/> | / | <input type="text"/> |

About Perpetual

Founded in 1886 as a trustee company, Perpetual has helped individuals, families and companies contribute to the health and wellbeing of others through philanthropic endeavours across generations and through all market conditions.

Today, Perpetual is one of Australia's largest managers of philanthropic funds, including acting as trustee for more than 1,000 charitable trusts and endowments holding over \$2.9 billion in funds and distributing over \$100 million annually (as at 30 June 2020).

Perpetual manages investment funds exceeding \$28 billion, has over \$940 billion of funds under administration and advises clients on over \$14.3 billion of investments (as at 30 June 2020).

We have assisted in the establishment, investment and distribution of funds for medical, social, environmental, religious, cultural and educational purposes.

Our experience has given us a deep understanding of the needs of philanthropists, charitable and not-for-profit organisations, and the professionals supporting these groups.

Perpetual is one of Australia's most experienced investment management, financial advisory and trustee services groups, with an enduring passion for protecting and growing our clients' wealth and a commitment to helping philanthropists and not-for-profit organisations make an enduring impact on the community.

We are committed to helping donors and charitable organisations maximise their financial resources and develop sustainable giving programs.

The Perpetual Foundation

In June 1998, we established the Perpetual Foundation to bring together the generosity of donors with our resources and expertise in managing and investing charitable funds.

The Foundation is a public ancillary fund established in perpetuity to manage and distribute funds to eligible organisations.

More Information

To find out more about setting up an endowment within the Perpetual Foundation or to discuss your options for charitable giving, please contact our philanthropy specialists.

Email

foundation@perpetual.com.au

Phone

1800 501 227

Web

www.perpetual.com.au/philanthropy

Postal Address

Perpetual Foundation Endowments

Philanthropic Services

GPO Box 4172

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