



Australian  
**Philanthropic  
Services**

Simple. Strategic. Rewarding.

making giving simple, strategic and rewarding





### **The benefits of ancillary funds**

Private and public ancillary funds enable you to put aside money in a trust to support charities over the long term. They are an efficient, satisfying and tax effective way to manage your philanthropy.

#### **By setting up a philanthropic structure, you can:**

- Make a tax-deductible donation now and decide which charities to support later
- Invest your charitable funds over the long-term
- Provide an enduring revenue stream to charities
- Involve family members, children, grandchildren and generations to come
- Create a lasting legacy

Contact us today to arrange an introductory conversation – we are here to help.

### **Private ancillary fund service**

A private ancillary fund (PAF) is a type of charitable trust that offers an effective way to manage your philanthropy. Put simply, you donate money into the PAF and get a tax deduction for the donation. The capital is invested and grants are made to charities from the PAF each year.

Our PAF service is designed to be a one-stop-shop. We do all the work to set up your PAF and handle the paperwork from day one. The service includes:

- PAF establishment paperwork and approvals
- All ongoing administration and compliance
- Preparation of accounts
- Facilitation of annual audit
- Running trustee meetings
- Reporting to the ATO and ACNC
- Grantmaking support
- Your own relationship manager
- Access to our 24/7 online portal

We don't manage the investments in your PAF. You or your wealth adviser can manage the investments without worrying about administration and compliance.



## Australian Philanthropic Services Foundation

We offer a public ancillary fund, the Australian Philanthropic Services Foundation. This is a communal philanthropic structure in which you can establish a named sub-fund.

Administration, investment and governance activities are taken care of by the trustee, leaving you to focus on the grants you would like to make.

- You choose the charities you would like to support
- A sub-fund can be established immediately with a minimum donation of \$50,000
- Donations to your sub-fund are tax deductible
- You can transfer the balance of your sub-fund to your own PAF in the future

We also support individuals, families and organisations who wish to set up their own public ancillary fund.

## Grantmaking and evaluation

We provide a comprehensive grantmaking and evaluation service, including:

- Support to develop a set of philanthropic goals
- Research into areas of need and suggestions of organisations to support
- Due diligence on charities
- Tools and templates to assist your grantmaking processes
- Sector research
- Funding round management
- Exclusive events, site visits and field trips

We support people at every stage of their giving journey - whether you are wondering where to start, seeking the right charities to support, or wanting to review your strategy and approach.





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## Support for wealth advisers and accountants

For professional advisers, we can help you to better support your clients with their philanthropy.

Our services have been designed to complement, not replace, the support philanthropists already receive from their accountant, lawyer or wealth adviser. In particular, we don't manage private ancillary fund investments, nor do we provide tax advice or any other accounting services.

Talking about philanthropy offers you the chance to deepen and broaden the relationship between you and your client – and often your client's family. We provide training and education to help you understand philanthropy and have informed conversations with your clients.





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Australian Philanthropic Services inspires effective philanthropy, and provides education and practical support for individuals and advisers.

We're unique because we're not-for-profit and completely independent.

We set up and administer private and public ancillary funds for individuals, families and businesses across Australia.

We offer a public ancillary fund, the APS Foundation, in which people can establish a named sub-fund.

We provide grantmaking guidance and support.



## Our people

The specialist team at Australian Philanthropic Services is a carefully selected group of professional, passionate people who are focused on taking the hard work out of establishing and managing your philanthropy.

We operate nationally, and collectively we have a skill set that includes finance, law, grantmaking and communications.

## Our Board

### Non Executive Directors

Chris Cuffe (Chairman) AO  
Tim Fairfax AC  
David Gonski AC  
Belinda Hutchinson AM  
Gail Kelly  
Dan Phillips  
Jan Swinhoe  
Michael Traill AM

### Executive Director

David Ward



### Chris Cuffe AO

After more than 25 years in the investment management industry, most notably as one of the founders and long-serving CEO of Colonial First State, Chris now undertakes a portfolio of activities centred around investment and philanthropy. He is founder and Chairman of Australian Philanthropic Services and has his own private ancillary fund.



### Antonia Ruffell CEO

Antonia has 20 years experience in leadership, fundraising, business development, marketing and philanthropy across the corporate and not-for-profit sectors. This includes establishing and administering private ancillary funds, and advising philanthropists on effective grantmaking.



### David Ward

David is considered a leading authority on private ancillary funds and wrote the Private Ancillary Fund Handbook for Philanthropy Australia. He spent 20 years in banking including 4 years as MD of ANZ Trustees which administered over 200 charitable trusts. David is a Social Investment and Philanthropy lecturer at Swinburne University.



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Australian Philanthropic Services Limited (ACN 155 905 829) (APS) is a public company limited by guarantee. It was registered under the Corporations Act 2001 on 24 February 2012.

Australian Philanthropic Services is a not-for-profit company registered with the Australian Charities and Not-for-profits Commission.

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