



Australian  
**Philanthropic**  
Services

Simple. Strategic. Rewarding.

making giving simple, strategic and rewarding





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Australian Philanthropic Services inspires and supports effective philanthropy, and provides education to individuals and advisers.

We're unique because we're completely independent, not-for-profit, and charge very modest fees.

We set up and administer private ancillary funds for individuals and families, and work with professional advisers to help them help their clients do the same.

We offer a public ancillary fund, the APS Foundation, and work with other interested groups who wish to establish their own public ancillary fund.

We provide grantmaking support and advice.





## The benefits of structured giving

**Community impact** – establishing a trust in perpetuity allows you to provide charitable causes with long-term sustainable funding.

**A family legacy** – giving through a private or public ancillary fund is a satisfying way to engage other family members, and helps to inspire future generations.

**Tax effectiveness** – the money you donate (both now and into the future) is tax deductible. The funds are tax exempt and franking credits are refunded, so your philanthropic dollar goes much further.

## Private ancillary fund service

A private ancillary fund, often referred to as a PAF, is a philanthropic trust structure that helps you take a more planned approach to your giving.

With the right advice a PAF is simple to establish and administer, and provides a tax effective, strategic solution to your grantmaking.

Our service is designed to be a one-stop shop for PAFs:

- We do all the work to set up your PAF, and handle the paperwork from day one.
- Clients have online access to information on their PAF.
- We take care of all ongoing administration, including preparation of accounts and overseeing compliance.
- PAF directors are fully briefed on and guided through compliance issues.
- We charge a low fee, and ensure clients know upfront any costs that will be incurred.
- Each PAF has a dedicated APS Adviser, with extensive experience in philanthropy management.



## Public ancillary fund service

If a private ancillary fund is not the right solution for you, we offer a public ancillary fund, the Australian Philanthropic Services Foundation. This is a communal philanthropic structure with a number of unique benefits:

- Administration, investment and governance activities are the responsibility of the trustee, leaving you to concentrate on the charities you would like to support.
- A sub-fund can be established immediately, as there is no requirement to establish a new trust or trustee company.
- The money you donate is tax deductible.
- A public ancillary fund is a tax exempt structure, so your philanthropic dollar goes further.

We also assist and support organisations to set up and administer their own public ancillary fund in a cost effective manner.

## Grantmaking and evaluation

Deciding which organisations you'll support can be hugely rewarding, but can also be a challenge. There are over 55,000 tax concession charities in Australia, and nearly 28,000 of these are able to accept tax deductible donations.

As one of the few experts in this field, we can assist you with your grantmaking, and help you to better understand the not-for-profit landscape.

Our grantmaking and evaluation service can help you:

- Develop a set of philanthropic goals.
- Research areas of need that are of most interest to you.
- Put your grantmaking plan into action.
- Measure the impact of your giving.





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## Advice for advisers

Private and public ancillary funds provide an ideal pathway for philanthropy to grow. For professional advisers, we can help you to help your clients with their philanthropy.

Our services have been designed to complement, not replace, the advice philanthropists already receive from their accountant, lawyer or wealth adviser. In particular, we don't manage the funds invested in private ancillary funds.

Talking about philanthropy offers you the chance to deepen and broaden the relationship between you and your client - and often your client's family.

As money in a private ancillary fund is often invested in perpetuity, it's an ideal environment for long-term investing.

We can also assist and support you to set up and administer your own public ancillary fund for your clients.



## 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)

Tim Fairfax AC

David Gonski AC

Belinda Hutchinson AM

Dan Phillips

Jan Swinhoe

Michael Traill AM

### Executive Director

David Ward



### Chris Cuffe

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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