PROFESSIONAL ADVISORS

LIVE HERE GIVE HERE | HAWKE'S BAY FOUNDATION

Together let's build a thriving Hawke's Bay, now and forever.

As a professional advisor your clients often turn to you when thinking about wealth, estate planning, or lifetime giving. Many want to make a positive impact in Hawke's Bay but may not know the most effective way to do so.

By partnering with Hawke's Bay Foundation, you can help your clients turn their charitable intentions into lasting, local impact — supporting the people and places of our region today, tomorrow, and forever.

Why Hawke's Bay Foundation matters

Hawke's Bay offers a wonderful lifestyle and incredible opportunities, but this isn't the reality for everyone. Many local families face complex challenges — low incomes, poor housing, high health needs, and social disadvantage.

Hawke's Bay Foundation exists to tackle these challenges head-on. We provide reliable, long-term funding streams for local causes, pooling and prudently investing gifts so the returns can keep giving forever. Together, we ensure every contribution has a greater, enduring impact.

Here's how it works:

Gifts

are invested & grown

& the ongoing income earned

go to local causes you love

How we work with Professional Advisors

We see professional advisors as essential partners in building a thriving Hawke's Bay.

Our role is to make it easier for you to:

- Introduce clients to effective giving opportunities.
- Explain how different giving options work within Hawke's Bay Foundation.
- Tailor charitable strategies to your clients' goals, values, and estate plans.
- Provide reassurance that donations are invested prudently and distributed wisely.

We work alongside you and your clients, offering guidance, templates, and support every step of the way — from living giving to legacy planning.

Benefits for your clients

- Local impact: All donations stay in Hawke's Bay, supporting the causes that matter most.
- Smarter giving: Pooled, prudently invested funds ensures the long-term impact of every gift.
- Recognition options: Tailored acknowledgment for gifts, if desired.
- Tax efficiency: Lifetime gifts may qualify for a 33.3% tax rebate, subject to annual taxable income limits.
- Support for whole Hawke's Bay region: clients can make one strategic donation, knowing it will support the wider Hawke's Bay community, for generations to come.

With over 12 years of experience and more than 400 grants made to local charitiable organisations, Hawke's Bay Foundation is a trusted vehicle for lasting philanthropy.

Giving options for your clients

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Named Endowment Funds

Create a fund in your client's name or family name. Income is distributed locally, creating impact today and forever, while allowing the client or their descendants to receive annual reports on earnings and distributions.

Trust Transfers

Is your client struggling with compliance following the Trust Act changes? We offer a simple solution for the resettlement of Charitable Trusts and Incorporated Societies.

Giving to Established Funds

Clients can contribute to existing funds or the Hawke's Bay Community Fund, allowing us to direct resources where they are most urgently needed.

Community Funds

Community groups and charities can create endowment funds to provide long-term financial stability, ensuring their services and programs benefit Hawke's Bay residents for generations.

Legacy Giving

Through a Will or trust distribution, your clients can leave a gift that creates an enduring legacy, supporting Hawke's Bay causes long into the future.

Funding for Hawke's Bay Foundation operations

Funding our operations ensures we continue to safeguard donor funds, distribute grants effectively, and grow Hawke's Bay Foundation's capacity to support the region.

Suggested Conversation Starters

To open meaningful discussions, you might ask your clients:

- Are there charities you currently support?
- Which causes or areas of Hawke's Bay are most meaningful to you?
- Have you thought about leaving a gift in your Will?
- Are there ways your charitable giving could align with your financial and estate planning goals?
- How can your family be involved in creating lasting impact in our community?

These questions help your clients connect their values to practical, lasting giving solutions.

Resources available for your clients

To make your conversations easier, we provide a range of tools and resources:

- Sample bequest clauses to simplify legacy planning
- Memorandum of Wishes templates for Named Endowment Funds
- Community insights to help your clients make informed decisions about their giving
- Tailored briefings or meetings for advisors and their clients.

Our goal is to help you deliver confidence and clarity when discussing charitable options with your clients.

Why Partner With Hawke's Bay Foundation

Our Board, Ambassadors, and Sub-Committee Members are deeply committed to Hawke's Bay. Supported by a small but experienced team, we provide:

- Expert governance and financial oversight of donor funds.
- Community insight to ensure grants address the most urgent local needs.
- A platform for clients to create a long-term legacy, building a thriving Hawke's Bay.

We partner with advisors to make giving simple, impactful, and aligned with each donor's goals, providing support at every step.

HAWKE'S BAY FOUNDATION • LEGACY PARTNERS •

Let's work together

We would love to hear from you

Please reach out with any questions
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