

# Giving and growth

FOR THE 12 MONTHS TO 30 JUNE 2024

## A record year of charitable giving

With a growing \$2.43 billion committed to charity across all APS giving structures, this year saw our clients give more than \$200 million to charities they care about.

### GIVING ACROSS APS



**\$2.43b**

committed to charity  
in giving structures  
supported by APS



**\$203.4m**

distributed to charity



**5,953**

gifts made



**1,833**

charities supported



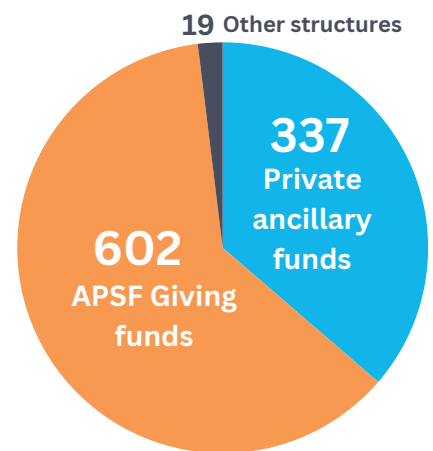
**171**

new clients



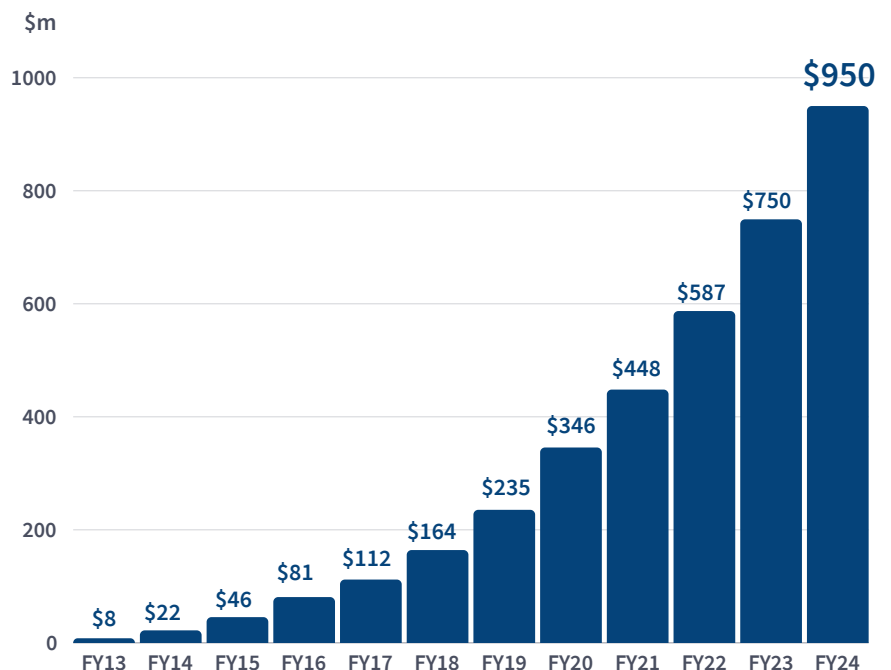
**950+**

APS clients



### CUMULATIVE TOTAL GIVING FROM APS CLIENTS

Since our inception in 2012, APS clients have given \$950m to support the community.



# Giving and growth

FOR THE 12 MONTHS TO 30 JUNE 2024

## PRIVATE ANCILLARY FUNDS

APS is the leading provider of philanthropic services in Australia, establishing 34% of all private ancillary funds (PAFs) in FY2024.



**\$2.07b**  
held in assets



**\$183.6m**  
distributed to charity



**356**  
PAFs & other structures



**\$1.8m**  
median PAF balance



**\$10,000**  
median gift

## APS FOUNDATION

APS Foundation is the fastest growing public ancillary fund in Australia. In the year to 30 June 2024, our 600 giving funds holders gave almost \$20 million to charities they care about.



**\$359.5m**  
balance



**\$19.8m**  
distributed to charity



**602**  
giving funds



**\$220,000**  
median giving fund balance



**\$3,000**  
median gift

## Investment performance



	1 years (pa)	7 years (pa)	Since inception (pa)
<b>General Portfolio</b>	<b>10.2%</b>	<b>8.1%</b>	<b>10.1%*</b>
<b>Focused Portfolio</b>	<b>9.1%</b>	<b>N/A</b>	<b>8.3%**</b>

\*The inception date of the General Portfolio is July 2012. \*\*The inception date of the Focused Portfolio is 1 July 2022. Figures greater than one year are expressed as annual compound returns.

## Our team



Judith Fiander  
CEO



David Ward  
Technical Director



Pennie Loane  
Head of Advisory,  
National



Rachael Rofe  
Head of APS Foundation



Kate Bowditch  
Partnerships & Development,  
National & WA



Kate Lade  
Adviser, NSW & ACT



Stephanie Macintosh  
Adviser, NSW



Elyse Cook  
Adviser, NSW



Peter Peacock  
Adviser, VIC



Susan Power  
Adviser, VIC



Ally Newton  
Adviser, QLD



Mary Waldron  
APS Foundation, SA



Kate Stone  
Head of Giving Services,  
National



Fiona Higgins  
Specialist Adviser, Giving,  
National

## APS Foundation Investment Managers



Chris Cuffe  
APS Chairman & Founder,  
Portfolio manager, General portfolio



David Wright  
Portfolio manager, Focused portfolio

## Growing giving for good



APS is a registered charity with the Australian Charities and Not-for-profits Commission and has Item 1 Deductible Gift Recipient status.



APS is a proud Impact member of Philanthropy Australia.