

Expand your client offering with specialised philanthropic support

Australian Philanthropic Services (APS) works with professional advisers to help you build a philanthropic offering for your clients. Our services have been designed to complement the support your clients already receive from you.

With APS as your trusted philanthropic partner, you:

- Access our expertise, resources and networks to enhance your clients' experience and joy of giving
- Outsource the administration and compliance of your clients' giving structures to a dedicated APS specialist, while you, or their preferred investment adviser, manage their philanthropic capital
- Maintain visibility of your clients' fund balance, investment returns, and gifts through third party access to their online portal.

Tax-effective giving solutions

APS offers tax-effective giving structures for your clients to set aside funds for charity and make gifts over time. Clients can start with a tax-deductible donation of \$40,000 or above, and receive tax-free investment returns on their balance, growing their potential to give.

Client-centred giving support

Our team provides specialised giving services as clients support the causes that matter most to them, including:

- Guided giving conversations to draft a giving strategy
- Help to find and engage with relevant charities
- Engaging multiple generations through values-based workshops
- Support with succession planning to ensure a smooth transition and secure philanthropic legacy
- Access to philanthropy-focused events, resources and networking opportunities.



- ✓ Outsource the admin, not your client relationship
- ✓ Efficiently manage compliance and technical requirements
- ✓ Give your clients access to expert support with their giving

Structured giving options

We work with you and your clients to design the appropriate structure for their giving and guide you through the establishment process and beyond.

Private Ancillary Fund (PAF)

A PAF is a type of charitable trust that allows individuals, families, or organizations to establish their own philanthropic foundation. APS offers a complete establishment, administration, PAF accounting and compliance service including:

- Preparation and lodgement of all establishment paperwork
- Ongoing liaison with regulators
- Secretariat services and attendance at board meetings
- Preparation of financial statements and facilitation of the annual audit
- Maintaining registers of disclosures and related party transactions
- Monitoring compliance with the PAF guidelines.

Giving funds - APS Foundation

A giving fund is your client's own charitable giving account within the APS Foundation, providing a simple, tax-effective and flexible way to give while simultaneously growing funds for charity.

- Quick and easy set-up in just one day
- Accessible entry point of \$40,000+
- Professional investment management, delivering strong investment returns and two portfolio options
- Administration is provided at a highly competitive fee, allowing clients to focus on selecting charities to support
- Access transparent and up-to-date fund activity and investment performance for your clients via our online portal.



Partner with us

APS is Australia's leading independent, not-for-profit philanthropic services organisation. Our services have been designed to complement the support your clients already receive from you. We don't manage PAF investments or provide tax or strategic advice. Our focus is on supporting and growing effective philanthropy.

“ APS has provided an invaluable administrative service through their quiet professionalism and sound advice. I have no hesitation in recommending their services.
– Rohan Abayasekara ACMA, CGMA

Contact

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This information is intended as a guide only. For details, please contact Australian Philanthropic Services (APS). Australian Philanthropic Services Limited (ACN 155 905 829) is a public company limited by guarantee. APS is a not-for-profit company registered with the Australian Charities and Not-for-profits Commission. Australian Philanthropic Services Foundation Pty Limited (ACN 158 036 349) is the trustee of the APS Foundation and is a wholly-owned subsidiary of Australian Philanthropic Services Limited.

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