



The Australian Unity Trustees Foundation

Create a meaningful
philanthropic legacy.

Give back to your community by establishing a charitable foundation.

Give back to your community — now and in the future — by establishing a charitable sub-fund.

The Australian Unity Trustees Foundation helps individuals and families to include philanthropic giving in their estate and wealth planning.

What is the Australian Unity Trustees Foundation?

The Australian Unity Trustees Foundation is a Public Ancillary Fund (PuAF), under which you can establish your own charitable sub fund to support the charities or causes close to your heart.

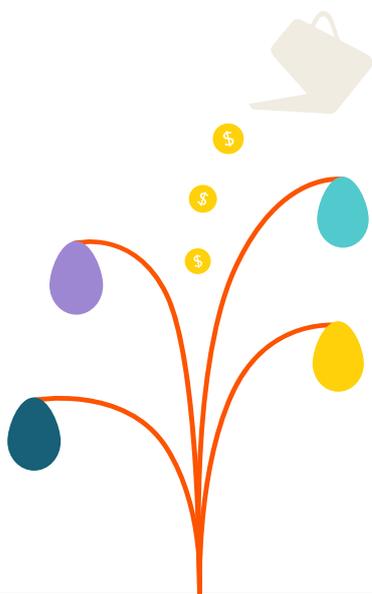
Why use a sub fund?

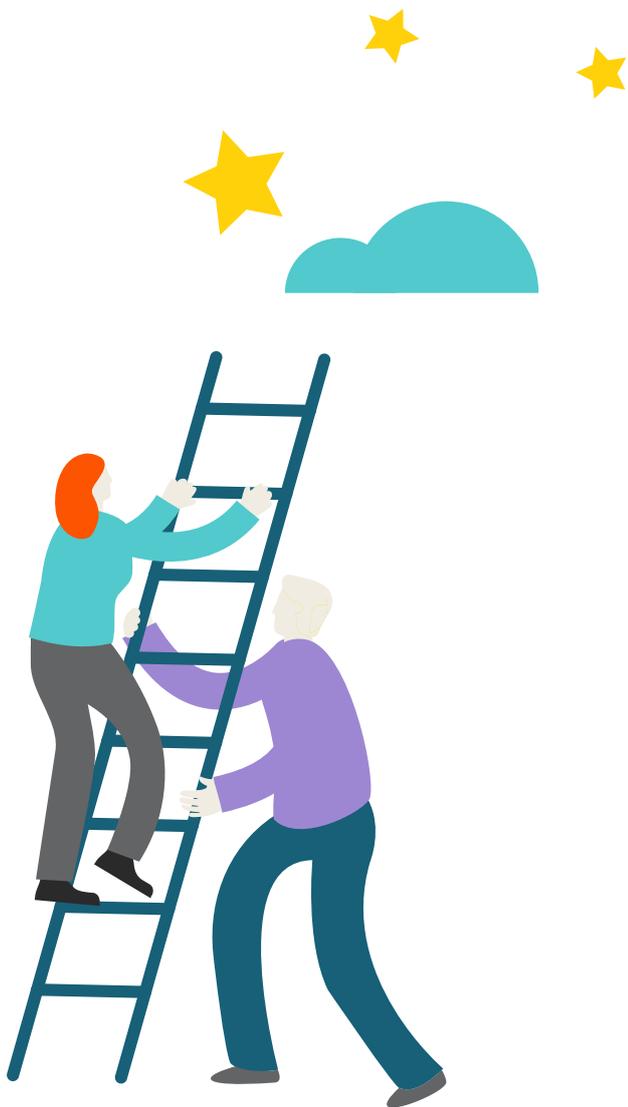
Establishing a charitable sub fund can be a rewarding experience for you and your family for generations to come.

The Australian Unity Trustees Foundation is ideal for philanthropists who want to support the community, knowing their contribution can be invested into perpetuity and maintain value in real terms.

While the ideal structure will depend on your circumstances, a sub fund may be right for you if you wish to experience the joy of philanthropy, without the responsibility and obligation of managing the investment, governance and administration.

A sub fund can be named for a loved one or assigned your family name — an ongoing reminder of your legacy.





How do we support you?

We partner with you and your family to establish and manage a sub fund.

By working together, we're here to help your foundation's cause and achieve your charitable goals.

As sole trustee of the Australian Unity Trustee Foundation, we manage the investment, governance and administration of your sub fund, including:

- General trust administration
- Management of all assets of the trust
- Management of all ATO and ACNC requirements
- Record keeping and management
- Verification of DGR and charitable status of recommended charitable organisations
- Completion of legal checking to ensure the purposes of the gift are charitable at law
- Annual statements
- Assessment and approval grant recipients

What happens when I pass away?

On your passing, your sub fund can continue to distribute the amount available each year based on investment performance and the minimum distribution requirements in line with your wishes and other legal and charitable requirements.

Your family members can also, if appropriate, be involved in the recommendation of grant recipients to Australian Unity Trustee.

How do I get started with a sub fund?

With an initial donation of \$20,000, you can establish a named sub fund within the Australian Unity Trustees Foundation. Once your donation is accepted, it is held by Australian Unity trustees as the trustee of the Australian Unity Trustees Foundation. Please note that your donation is irrevocable and cannot be refunded.

Once you have established a named sub fund, you can continue to contribute additional donations into your fund during your lifetime. You can also contribute further by providing or a bequest or distribution to your fund in your will.

All initial donations and subsequent donations made into your fund during your lifetime are tax deductible.

If you wish, you can choose to remain anonymous when distributing the income from your fund to eligible charitable organisations each year.

A dedicated client relationship manager will work with you to discuss the performance of your accounts and their giving objectives. Our dedicated client team is supported by in-house investment, tax and finance and legal experts.



We're here to help

Visit our website or speak to our friendly team to find out if the Australian Unity Trustees Foundation could be right for you.

1800 878 783

australianunity.com.au/wealth/protect-your-assets/philanthropy

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