

## Making a lasting difference

### I already give to charities, why set up a charitable trust?

Establishing a charitable trust allows you to donate to charities on an ongoing basis. Rather than making a direct once off donation, setting up a trust or sub-fund gives you the opportunity to preserve your gift to your chosen charity or charitable cause for years to come.

### A charitable trust can help you:

- Create an ongoing memorial to a person or family
- Make regular tax deductible donations
- Ensure your initial donation continues to keep on giving, as income is distributed to charities year after year

### Creating a Charitable Trust with State Trustees

You can choose to establish a sub-fund within State Trustees Australia Foundation or set up a Private Charitable Trust.

- State Trustees Australia Foundation offers a simple and cost-effective way to make an ongoing donation to charity.
- Private Charitable Trusts are often set up for donors who have a specific purpose in mind for the funds, such as scholarships.

### How do I decide who to distribute to?

State Trustees are experts in grant-making and can help you identify the best way to donate to a specific charitable organisation or charitable purpose you wish to support.

### How can State Trustees help?

We make donating easier for you by:

- Undertaking grant research and assessing grant applications
- Preparing and executing a trust deed if needed
- Facilitating the annual distributions of the trust
- Preparing your will and including provisions for a bequest to establish a sub-fund
- Professionally managing funds to optimise returns for your chosen cause or charitable organisation
- Complying with ATO and ACNC governance requirements

### What's the next step?

Contact State Trustees and speak to a Charitable Trust Consultant: **(03) 9667- 6740** or send us an email if you would like more information: [charitable@statetrustees.com.au](mailto:charitable@statetrustees.com.au)

### Establishment

- A trust or sub-fund can be named after you, your family, or someone special in your life
- A sub-fund can be established with a minimum \$10,000 donation
- Family and friends can contribute to a sub-fund

### Benefits

- Recommend the charity or charitable cause you wish to support
- Donations may be tax deductible
- Income generated within the account is tax free
- Your donation is preserved, with the income distributed annually

### Fees

- No establishment fee
- 1.056% Administration fee
- 1.10% Management fee