

# Fact Sheet - For Professional Advisers



## We are here to help

We are proud to partner and maintain strong relationships with local professional advisers like YOU.

Working together we can help your clients leave a personal, meaningful and lasting legacy for our community.

You know your clients.  
We know philanthropy.

## Discussing charitable giving with clients

New Zealand is one of the most generous countries in the world. It's not surprising that many of your clients may be thinking about giving something back to their community but may not know how or where their generosity can have the most impact.

Your clients rely on your guidance to make important financial decisions. When it comes to charitable giving, we can partner with you to simplify their giving and amplify their impact.

*“The Geysler Community Foundation objectives and structure are designed to support the local community in a sustainable manner.*

*This makes Geysler the ideal vehicle for people from all walks of life, to give back to their local community.”*

**Michael Grantham**  
Grantham Law (2000) Limited

## We can help you:

- Identify your clients' charitable interests and motivations.
- Provide information on giving options.
- Tailor-make a giving plan.
- Manage the administration.
- Provide local knowledge on organisations doing impactful work in our community.
- Offer advice and resources on how to include philanthropy in your wealth planning conversations.



## The philanthropic conversation

Philanthropy is a very personal decision.

As a professional adviser, you are a vital stakeholder who helps us nurture and build the prosperity of our region through philanthropy.

## Life's milestones

These key events in a client's life can open up the greatest opportunity for a conversation about charitable giving:

- Retirement
- Estate planning
- Selling a business
- Sale of assets
- Year-end tax planning
- Inheritance
- A major life event

## Tips for starting your philanthropy conversations

- Advise your clients to consider family first.
- Explore your clients' values, interests and passions and ask questions such as:

“How does your current charitable giving align with your values and interests?”

“Are you currently involved in any non-profit organisations? And “Are there any particular causes you care about?”

“Do you typically support the same charities every year?”

“Have you considered leaving a gift in your will to a charity or cause you care about?”



## Motivations behind philanthropy



Community impact



A passion for a cause



A desire to give back



Reassurance that their wealth will be used wisely



Personal legacy

“Imagine if people were to leave 10% of their estate to the local community through Geysler. What a benefit that would be for Taupō.”

Helene Phillips

Geysler Community Foundation Chairman

## Let's work together

Geysler was created for local people, by local people to nurture and build the prosperity of the Central Volcanic Region through community giving, partnerships and philanthropy.

We can provide the philanthropic advice you need to help your clients achieve their charitable goals. We look forward to working alongside you.