



TOOLKIT FOR PROFESSIONAL ADVISORS

Find out about Hands Across Canberra and the benefits to your clients and the community through partnering with us.

Provide your clients with intelligent and strategic giving options that positively shape our community now and in the future and could help with tax planning.

To assist you and your clients to understand the options and move to action, the following tool kit has been developed.

At a glance



NAMED FUND ACCOUNTS

NAMED FUND Accounts provide a simple and rewarding way to structure your client's philanthropy with potential tax effective consequences. Grants provided through these accounts are directed to eligible charities registered by the Australian Charities and Not-for-Profit Commission.

Creating a NAMED FUND provides your client with different levels of engagement as to beneficiaries of the grants from their accounts through either a passive approach, where the beneficiaries are determined by Hands Across Canberra through their in-depth community engagement or by selecting an eligible charity to direct the grant.

Your client can establish a NAMED FUND Account with a starting contribution of \$10,000 and grow this over time to create a legacy for the future.

Hands Across Canberra will work with lawyers, financial planners, accountants and wealth advisors, who are dedicated to helping their clients fulfil their charitable goals.

We offer support and the resources outlined in this brochure to complement the service professional advisors provide to their clients, helping them experience the joy of effective giving and understand how their philanthropy can create meaningful positive social change and help to make the ACT/Canberra a more caring place where no one is left behind.

**Hands
Across
Canberra**
Your Community Foundation



WHO WE ARE

Hands Across Canberra is the National Capital's community foundation. Since 2010, it has been working together with local for-purpose organisations on raising awareness in the community about need, has been an enabler for innovative partnerships and collaboration and has worked hard to increase the level of giving and philanthropy in Canberra.

ANNUAL IMPACT REPORT

Hands Across Canberra issues an annual Impact Report to provide details of where grants have been issued, amounts and also outlines the approach adopted for the areas selected.

This Report is part of Hands Across Canberra transparency and accountability commitment back to the ACT Community in relation to its activities.

Visit our Publications page to learn more:

www.handsacrosscanberra.org.au/about-us/publications/



CANBERRA VITAL SIGNS

Hands Across Canberra undertakes an exercise with the ACT Community, including the Not-for-Profit Sector, Business and Government Agencies to establish a snapshot of the issues we face, areas of need and vulnerable segments of our community.

This assessment is undertaken through a wide-reaching consultation process which complements our annual priority setting activities. The results of this assessment are published in the Vital Signs Report

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THE POWER OF PARTNERSHIP

Why partner with us?

Hands Across Canberra has established itself as a significant philanthropic organisation in Canberra, the ACT and the nearby region, progressively building its presence and credibility. Recently the ACT Government provided a gift of \$5M to establish the Chief Minister's Charitable Fund to be administered by Hands Across Canberra.

Hands Across Canberra has a robust community engagement process that includes not-for-profit organisations that deliver services, businesses and government agencies to identify areas of need or shortfall in services. There are over 250 charities registered with Hands Across Canberra.

We are future focused, constantly looking at innovative grantmaking, partnerships and impact investing. Through our grants process we seek to help segments of the community to transition to become healthy, resilient, empowered and sustainable.

As an independent, not-for-profit community philanthropic organisation, we provide a simple, powerful and personal approach to giving.



KNOWLEDGE

Hands Across Canberra has in-depth knowledge of critical issues facing Canberra, the ACT and nearby region and the charities working here to address these challenges. We know our community.



EXPERTISE

Our team can provide philanthropic expertise such as establishing a NAMED FUND Account within our Public Ancillary Fund.



TRUST

We have worked to develop a reputation of responding to the needs of our community and can help your clients to create a legacy for the future through giving while living.



SUPPORT

We take care of the investment, governance, compliance and administration, with minimal fees allowing clients to focus on supporting the issues they are passionate about.



COLLABORATION

Apart from grant funding priority projects, we also look towards leveraging co-funding opportunities that deliver enhanced outcomes as well as collective giving opportunities to maximize the impact of your clients philanthropy.

To discuss how we can help your client achieve their philanthropic aspirations, please contact us.

Professional advisor forms and resources



**NAMED FUND
OVERVIEW**



**ENDOWMENT
EXAMPLE**



**INSPIRING PEOPLE TO MAKE
A DIFFERENCE**



**NAMED FUND
ESTABLISHMENT FORM**



**HOW TO SET UP A
NAMED FUND (FAQ)**



**WORKING IN PARTNERSHIP WITH
PROFESSIONAL ADVISORS**



**VITAL SIGNS
REPORT**



**ANNUAL
IMPACT REPORT**

**Hands
Across
Canberra**
Your Community Foundation



We welcome the opportunity to discuss how Hands Across Canberra can help you fulfill your philanthropic vision.

**Contact Genevieve Jacobs
AM**

Chief Executive Officer on
0428 432 621 to discuss this
matter further.

HANDS ACROSS CANBERRA

0428 432 621

gjacobs@handsacrosscanberra.org.au

PO Box 5519

Kingston ACT 2604

handsacrosscanberra.org.au

ABN: 43 661 430 024

