



PHILANTHROPY

WHY WOULD YOU CHOOSE A CHARITABLE TRUST OVER AN OUTRIGHT BEQUEST?

In some circumstances, it may be appropriate to make an outright bequest to your preferred charity or several charities that you wish to benefit. By making an outright bequest however, you are giving the charity complete discretion as to the application of that money. Alternatively, you may wish to make a more substantial contribution in the form of distributions from a charitable Trust, with precise conditions and guidelines over how those funds are to be used by the charity. This allows you to ensure that you are making a lasting and valuable contribution which will continue to generate a continuous stream of income and benefit to your chosen causes following your death.

There are many real examples of charitable Trusts that were established many decades ago that today have significant capital sum and have distributed millions of dollars to benefit the community over those decades. A significant benefit of a charitable Trust is that it can operate as a lasting memorial in your name or be used to honour the name of a respected person or family member. You can share the experience of giving with your family members and descendants and establish a tradition of social responsibility for future generations.

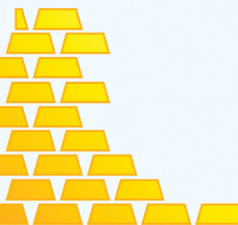
HOW CAN WE HELP

At Fiduciary Services Limited, we assist individuals and families achieve their philanthropic goals in an effective, efficient, and enjoyable manner. Drawing on our deep resources and experience in philanthropy, we assist families and their family offices in designing, implementing, and evaluating their philanthropic plans.

Whether as an individual or as a family, who already has philanthropic initiatives and vehicles in place or is considering pursuing philanthropic goals for the first time, there are some important elements that must be addressed to enable you achieve your philanthropic objectives. This relates to administrative, educational, strategic and investment elements.

Fiduciary Services Limited's Philanthropy services team will work in partnership with you and your financial adviser to ensure your giving program is structured to best suit your needs. We will ensure that the preparation of your Will and the establishment of the Trust complies with those guidelines and make it as simple as possible for your Executor to establish the Trust. We can also manage all aspects of the ongoing administration of your charitable Trust, including the maintenance of all transaction records, minutes of all meetings recording funding and investment decisions and ensuring the lodgment of all regulatory reporting.

For more information on our Philanthropy services please email contact@fiduciaryservicesltd.com



If you need further clarifications on this, please reach out to us
contact@fiduciaryservicesltd.com