

# PROFESSIONAL ADVISORS NETWORK PROGRAMME



Many of your clients may be thinking about giving something back to the community, but do not know how and where their generosity can have the biggest impact. Momentum Waikato's Professional Advisor Network Programme (PAN) aims to encourage Professional Advisors to have conversations with clients about charitable giving options as an integral part of their estate and financial planning activities.

## HOW CAN WE HELP

Because Momentum Waikato is a local organisation, we understand our communities and how your clients can collectively make the greatest impact for our region, and can support you in having these conversations with your clients – helping drive more local generosity to local causes. We can provide the philanthropic advice you need to help your client achieve their charitable goals. As an Advisor you play a key role in helping your clients to integrate their philanthropic goals into major personal, business and financial decisions. We offer your clients a personal and enduring way to leave a lasting legacy that will benefit the community forever.

### Gifts can be made in several ways

People writing their Wills (**Bequests**): As a Professional Advisor ask, "Have you considered charitable giving?" A simple conversation starter, a lot of people have not given this any thought. Directed by the donor's Bequest Plan, bequests can be used for almost anything. Many donors chose to allocate a portion of their estate to an endowment fund, to generate a steady income stream and honour the donor's gift into the future.

Trustees of Trusts (**Trust Transfers**): Trusts that are inactive or doing very little, with Trustees considering winding down the Trust. Funds are transferred to Momentum Waikato to establish a Named Fund to continue supporting the work of the original Trust.

Donors who want to make a living donation now (**Pass-through Donations**): Momentum works with other entities to deliver outcomes. Previously these included the Medieval Garden and the Waikato Regional Theatre. Momentum Waikato's current focus is building an endowment fund for the New Zealand Graduate School of Medicine at the University Waikato, to support student scholarships, student placements, cost-of-living stipend, and research.

### There are many benefits of giving through Momentum Waikato.

There is a once-in-a-generation shift of wealth on our doorstep, with an estimated \$1.6 trillion being passed down to the next generation over the next couple of decades. Community Foundations around New Zealand, like Momentum Waikato Community Foundation, present a unique opportunity for individuals to consider when it comes to charitable giving.

- Our regional focus and local expertise allows your client to give to Waikato causes they are passionate about, supporting their community forever.
- Because endowments are permanent your client's gift keeps on giving, now and for generations to come.
- A Named Fund enables your client to specify the title of their fund and the organisations or initiatives they wish to support.
- Annual updates enable your client to keep track of their fund's earnings and distributions.
- The reputable trustees and prudent stewardship of Momentum Waikato funds ensure that your client's gift is in safe hands.
- Donations made to Momentum Waikato qualify for a tax credit.
- Momentum Waikato can provide you with guidance and resources to assist you in establishing your client's endowment fund.

## WE ARE HERE TO HELP

### Momentum Waikato Presentation

Momentum Waikato staff can visit your organisation to engage with staff and clients. Momentum Waikato will recognise Professional Advisor Champions on our website, as well as inviting PAN Champions to related Momentum Waikato events, and providing supporting collateral.

### Why trust Momentum Waikato?

Momentum Waikato Community Foundation is an independent, not-for-profit organisation, covering the Waikato / Coromandel region. We are different because we aren't about one single cause, we are about a place and its people.

Momentum Waikato was established in 2013 by the WEL Energy Trust to fill the philanthropic gap between communities and individual partnerships; to grow a regional endowment fund.

Momentum Waikato is governed by an independent Board of Trustees.

The Foundation is audited annually to ensure due process and responsibilities are followed.

Working with investment managers, clients are assured that their money is managed professionally.

Currently in excess of \$40m of funds is administered by Momentum Waikato as per donor wishes (2025). A charitable trust, donations to Momentum Waikato qualify for a tax credit.

Momentum Waikato is part of a network of 18 community foundations in New Zealand, Community Foundations of Aotearoa New Zealand.

At Momentum Waikato, we understand the art of conversation with clients is a deliberate approach. Collaboratively with our Professional Advisors, we can grow a culture of targeted generosity that serves our communities well beyond our lifetime.

*“Many of my clients have a generous intent but simply aren't aware of how to provide a gift that keeps on giving forever, such as endowment funds like those Momentum Waikato provides locally. As a local firm we are actively involved in the community and always keen to engage with Waikato organisations that work for the good of the region”*

*Matthew Peploe – Managing Partner and Head of Estate and Trust Law at Harkness Henry.*

### FOR FURTHER ASSISTANCE, PLEASE CONTACT:

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Momentum Waikato is registered with the NZ Charities Commission #CC49535

 **MOMENTUM  
WAIKATO**  
*Te puaawaitanga o Waikato*