

# Philanthropy Australia's Professional Adviser Members & Services

	Entity	Set up of giving vehicles (including advice on choice of structure)	PAFs - either (a) set up only, (b) set up and administration only or (c) set up administration and manage investments	PuAFs	Sub-funds – including if portability from PuAFs to PAF is permitted or not	Charitable trusts (non-deductible gift recipients)	Administration of giving vehicles (managing grant distributions, advising on governance and legal obligations, fulfilling regulatory requirements and related matters)	Investment of funds (managing investments)	Philanthropic strategy advice (including workshops to assist with deciding focus areas and approaches to giving)	Estate planning (including preparation of wills and advising on bequests)	Reach	Website
1	<b>Australian Executor Trustees</b>	Y - all	Y - all	Y	Y	Y	Y for funds we act as trustee or custodian for	Y	Y	Y	National	<a href="https://www.aetlimited.com.au/home">https://www.aetlimited.com.au/home</a> .
2	<b>ANZ</b>	Y – via referral relationship	Y – via referral relationship	Y – via referral relationship	Y – via referral relationship	Y – via referral relationship	N	Y	Y	Y	National	<a href="https://www.anz.com.au/private-banking/services/">https://www.anz.com.au/private-banking/services/</a>
3	<b>Australian Communities Foundation</b>	Y	Y (a) and (b)	Y application process & conditions apply	Y portability permitted	Y	Y (no legal advice)	N	Y	Y Bequest/Legacy framework workshop. No will preparation	National	<a href="https://www.communityfoundation.org.au/giving/structured-giving">https://www.communityfoundation.org.au/giving/structured-giving</a>
4	<b>Australian Philanthropic Services</b>	Y	Y, a) and b). We also work with clients and their wealth adviser, where we set up and administer the PAF and the wealth adviser or client manages the investments	Y	Y a part of our PuAF, the APS Foundation. Portability is permitted in and out	Y, if the charitable trust travels with a PAF	Y	Y, we manage the investments of the APS Foundation, our PuAF. No, we work with clients and their wealth adviser, where we set up and administer the PAF and the wealth adviser or client manages the investments	Y	Y, we provide advice on bequests. No, we work with the client's existing advisers to include philanthropy in their estate and tax planning	National	<a href="https://www.australianphilanthropicservices.com.au/">https://www.australianphilanthropicservices.com.au/</a>
5	<b>Cooper Investors</b>	N	N	N	N	N	N	Y	N	N	National	<a href="http://www.cooperinvestors.com">www.cooperinvestors.com</a>
6	<b>Elston Asset Management</b>	Y	Y c) all services	Y	Y	Y	Y	Y	Y	Y	National	<a href="http://www.elston.com.au/philanthropy">www.elston.com.au/philanthropy</a>

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7	<b>EQT</b>	Y	Y – to all options and another service where we support third party (non-Equity Trustees) investment management partnerships	Y	Y - and portability is permitted	Y	Y	Y	Y	Y	National	<a href="https://www.eqt.com.au/philanthropy/equity-trustees-charitable-foundation">https://www.eqt.com.au/philanthropy/equity-trustees-charitable-foundation</a>
8	<b>Evans &amp; Partners</b>	Y	Y a) set up only and c) set up, admin & investment management	N	N	Y	N	Y	Y	Y	National	<a href="https://www.evansandpartners.com.au/">https://www.evansandpartners.com.au/</a>
9	<b>Filantropia</b>	N	N	N	N	N	N	N	Y	N	National	<a href="http://www.filantropia.com.au">www.filantropia.com.au</a>
10	<b>Gilbert + Tobin Lawyers</b>	Y	Y – (b)	Y	Y (portability permitted in some circumstances)	Y	Y	N	Y	N for prep. Y to advising charities in relation to disputed wills	National	<a href="https://www.gtlaw.com.au/expertise/charities-social-sector">https://www.gtlaw.com.au/expertise/charities-social-sector</a>
11	<b>Giving Connect</b>	Y – Advice only	N	N	N	N	Y	N	Y	N	National	<a href="http://www.givingconnect.com">www.givingconnect.com</a>
12	<b>Goodmans</b>	Y	Y (a) (b) (c)	Y	Y	Y	Y	Y	Y	Y	National	<a href="https://www.goodmanwealth.com.au/philanthropy/">https://www.goodmanwealth.com.au/philanthropy/</a>
13	<b>GoodWolf Partners</b>	Y	Y (b) in partnership with legal advisors Milner & Huang	Y (b) in partnership with legal advisors Milner & Huang	N	Y (b) in partnership with legal advisors Milner & Huang	N	‘Endowments For Impact’ Program – workshop series to help Trustees, Directors and CEO bring an impact frame over their investments	Y	N	National	<a href="http://www.goodwolf.com.au">www.goodwolf.com.au</a>

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14	<b>Hewison Private Wealth</b>	Y	Y – we liaise with clients & external parties to setup, administer PAFs, and we manage investments for these structures	Y – we develop investment policies and manage investments for these structures	N	Y – we develop investment policies and manage investments for these structures	N	Y – this is our core competency	N	Y – we do not prepare wills but assist clients in their estate planning deliberations in conjunction with their estate planning legal support.	National	<a href="https://www.hewison.com.au/">https://www.hewison.com.au/</a>
15	<b>Higher Purpose</b>	N	N	N	N	N	N	N	Y	N	National	<a href="https://higherpurpose.com.au/">https://higherpurpose.com.au/</a>
16	<b>Jana Advisors</b>	N	N	N	N	N	N	Y	N	N	National	<a href="https://jana.com.au/">https://jana.com.au/</a>
17	<b>JBWere</b>	Y	Y – advice only	Y – advice only	Y – set-up, admin and investments portability permitted	N	N	Y	Y	N	National and New Zealand	<a href="https://www.jbwere.com.au/for-purpose-organisations">https://www.jbwere.com.au/for-purpose-organisations</a>
18	<b>JM Philanthropy</b>	Y	Y - All including Finance, governance and compliance, program management and strategic advice. We do not manage investments	Y - As above	N	Facilitate service with law firm	Y including finance/accounting	N	Y	N	National	<a href="https://www.jaqminns.com.au/philanthropy">https://www.jaqminns.com.au/philanthropy</a> , <a href="http://www.granttoolbox.com.au">www.granttoolbox.com.au</a>
19	<b>Keystone Private</b>	Y	Y - c	Y - c	Y – c and Y portability permitted	Y - c	Y	Y	Y	Y	National	<a href="https://www.keystoneprivate.com.au/">https://www.keystoneprivate.com.au/</a>
20	<b>Koda Capital</b>	Y	Y - c	Y	Y	Y	Y	Y	Y	N	NSW, VIC, QLD	<a href="https://kodacapital.com/our-services/philanthropy-social-capital">https://kodacapital.com/our-services/philanthropy-social-capital</a>

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21	Lanyon Asset Management	N	N	N	N	N	N	Y	N	N	National	<a href="https://www.lanyonam.com/">https://www.lanyonam.com/</a>
22	Mutual Trust	Y bespoke advice on structuring and appropriate vehicle for purpose	Y (a, b, c)	Y – Mutual Trust Foundation	Y – portability permitted	Y	Y	Y including responsible investment offering	Y – full Foundation strategic, governance and leadership services	Y	National	Head of Philanthropy – Alice Walter <a href="mailto:alice.walter@mutualtrust.com.au">alice.walter@mutualtrust.com.au</a> ; Senior Foundation Manager – Melbourne, Adelaide – Rachel English <a href="mailto:Rachel.english@mutualtrust.com.au">Rachel.english@mutualtrust.com.au</a> ; Senior Foundation Manager – Sydney – Sarah Metcalf <a href="mailto:sarah.metcalf@mutualtrust.com.au">sarah.metcalf@mutualtrust.com.au</a>
23	Perpetual	Y	Y – (b) & (c)	N	Y & Y to portability	Y	Y	Y	Y	Y	National	<a href="https://www.perpetual.com.au/financial-advice/philanthropy-with-impact">https://www.perpetual.com.au/financial-advice/philanthropy-with-impact</a> , <a href="https://www.perpetual.com.au/insights/the-philanthropy-toolkit-maximum-impact-philanthropy">https://www.perpetual.com.au/insights/the-philanthropy-toolkit-maximum-impact-philanthropy</a>
24	Prolegis Lawyers	Y	Y	Y	Y	Y	Y	N	N	Y (advising on bequests and philanthropic gifts)	National	<a href="https://www.prolegis.com.au/">https://www.prolegis.com.au/</a>
25	PwC	Y	Y (c)	Y	N	Y	Y	Y	Y	Y (but the drafting of wills is outsourced)	National	<a href="https://www.pwc.com.au/pwc-private.html">https://www.pwc.com.au/pwc-private.html</a> , <a href="https://www.pwc.com.au/charities.html">https://www.pwc.com.au/charities.html</a>
26	State Trustees	Y	Y (a, b and c)	Y	Y	Y	Y	Y	Y	Y	Victoria	<a href="https://www.statetrustees.com.au/philanthropy-and-charitable-giving/">https://www.statetrustees.com.au/philanthropy-and-charitable-giving/</a>
27	Tanarra Philanthropic Advisors	N	N	N	N	N	N	N	Y	N	National	<a href="https://tanarraphilanthropic.org/">https://tanarraphilanthropic.org/</a>
28	Viridian Financial Group	N	N	N	Y portability permitted	N	N	Y	N	N	National	<a href="http://www.viridianadvisory.com.au">www.viridianadvisory.com.au</a>
29	Warakirri Asset Management	N	N	N	N	N	N	Y	N	N	National	<a href="http://www.warakirri.com.au">www.warakirri.com.au</a>