

# 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
<b>Philanthropy advice as sole primary service offering and philanthropic structure specialists</b>											
<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 - as a not-for-profit 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. Y, we prepare legacy statements and execute on behalf of our clients. 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>
<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	Y	'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>
<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>
<b>Giving Connect</b>	Advice only	N	N	N	N	Y	N	Y	N	National	<a href="http://www.givingconnect.com">www.givingconnect.com</a>
<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>

Last updated March 2024

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Organisations may appear under more than one category if they provide the services*

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<b>Tanarra Philanthropic Advisors</b>	N	N	N	N	N	N	N	Y	N	National	<a href="https://tanarraphilanthropic.org/">https://tanarraphilanthropic.org/</a>
<b>Community Foundations</b>											
<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>
<b>Accounting and Business Consultancy Firms</b>											
<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>
<b>Perpetual</b>	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>
<b>PwC</b>	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>
<b>Legal Support</b>											
<b>Gilbert &amp; Tobin Lawyers</b>	Y	Y - (a)	Y	N	Y	Y - advising on managing grant distributions, governance and legal obligations, fulfilling regulatory requirements and related matters i.e. no direct management or administrative involvement	N	N	Y - advice regarding contested wills	National	<a href="https://www.gtlaw.com.au/expertise/charities-social-sector">https://www.gtlaw.com.au/expertise/charities-social-sector</a>
<b>Milner + Huang</b>	Y - we also partner with GoodWolf Partners and Social Economy Group	Y - (a) & (b)	Y	Y - portability is permitted subject to certain conditions.	Y - we also partner with GoodWolf Partners	Y - we also partner with Social Economy Group	Y	Y - we also partner with GoodWolf Partners and Social Economy Group	Y - advising on bequests, philanthropic giving and structures	National	<a href="https://www.milnerhuang.com.au">https://www.milnerhuang.com.au</a>
<b>Prolegis Lawyers</b>	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>

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<b>Trustee Companies</b>											
<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> .
<b>Equity Trustees Ltd</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>
<b>Mutual Trust</b>	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>
<b>State Trustees</b>	Y	Y - (a), (b), (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>
<b>Wealth and Asset Managers</b>											
<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>
<b>Cooper Investors</b>	N	N	N	N	N	N	Y	N	N	National	<a href="http://www.cooperinvestors.com">www.cooperinvestors.com</a>
<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>
<b>Escala Partners</b>	Y	Y - (c)	N	N	N	Y	Y	Y	We work with selected experts in this field for our Private Clients	National	<a href="http://www.escalapartners.com.au">www.escalapartners.com.au</a>
<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>

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<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>
<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>
<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>
<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>
<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>
<b>Knightsbridge Wealth Management</b>	We provide general advice on the establishment of giving vehicles and structure that may suit needs and objectives. We will not be the ones to establish.	Y - We provide investment management and reporting services.	Y - We provide investment management and reporting services.	Y - We provide investment management and reporting to Sub-funds	Y - We provide investment management and reporting to Sub-funds	Y - Managing grant distributions, and governance such as investment policy documents and socially responsible investment procedures and guidelines.	Y - we specialise in multi-asset investment solutions, ranging from actively managed investment strategies to extensive portfolio modelling and reporting	Y	N	National, based in SA	<a href="https://www.kbwm.com.au/#home">https://www.kbwm.com.au/#home</a>
<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>
<b>Morgan Stanley Wealth Management</b>	Y	Y – manage Investments and set up through APS with no mark up in fees.	N	Y – through APS, but only for clients with intention to port to a	N	N – we use APS for these services	Y	Y	N	National/global	<a href="https://adviser.morganstanley.com.au/michael.willett">https://adviser.morganstanley.com.au/michael.willett</a> <a href="https://adviser.morganstanley.com.au/biljana.pavlovic">https://adviser.morganstanley.com.au/biljana.pavlovic</a>

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				PAF in the future.							
<b>Perpetual</b>	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>
<b>PwC</b>	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>
<b>Viridian Financial Group</b>	N	N	N	Y - portability permitted	N	N	Y	N	N	National	<a href="http://www.viridianadvisory.com.au">www.viridianadvisory.com.au</a>