CHARITY FUNDS

Setting up a Charity Fund with the Acorn Foundation will ensure that your organisation receives a continuous income stream in the future.

ACORN FOUNDATION
WESTERN BAY OF PLENTY

So, how does a Charity Fund work?

Organisation approaches Acorn Foundation to set up a fund.

A Charity Fund is established, as a Named Endowment Fund.
1% of the average value of the fund is charged annually for Acorn's operational expenses.

Donations are pooled and invested in perpetuity.
Craigs Investment Partners manages the Fund, with oversight from Acorn's Investment Committee and Trustees.

Fund becomes active once it reaches the Acorn threshold.
The threshold for distributions is $25,000.

Investment returns are used to make distributions to your organisation, year after year.
The capital is preserved, with any extra income reinvested each year to ensure fund health.

WHY IS ACORN A GOOD OPTION?

- **Donations from your supporters are pooled**, so even small amounts add up quickly — and unexpected bequests are easily managed.
- Funds are **professionally managed** by Craigs Investment Partners with robust governance by volunteer Trustees who are appointed, not elected.
- **Acorn can assist with marketing** by supplying promotional materials, listing your organisation on our website and promoting you through our social media channels.
- Our team is available to brainstorm **more effective ways to engage** your existing, and potentially new, donors.
- **No more than 1%** of donated funds are used to fund our administration costs.
- Acorn is a **completely independent entity** but it is part of a global network of Community Foundations — 18 of which are located across NZ.

HOW CAN YOUR SUPPORTERS CONTRIBUTE?

They can...

GIVE TODAY

Living giving donors can see their gifts make a difference and receive a 33.3% tax credit (up to their level of taxable income).

GIVE TOMORROW

Donors can leave a lasting legacy in their Will to support your fund. We can provide draft wording and guidance.

GIVE WHAT THEY CAN, WHEN THEY CAN

Remember, since you are pooling donations from your supporters, every gift counts – large or small, one-off or regular contributions.

What is the Acorn Foundation?

The Acorn Foundation is a community-based charitable trust that connects generous people who care with causes that matter in the Western Bay of Plenty region.

Many of our 500+ donors have set up endowments that leave money to the community when they die, while other donors get a lot of pleasure out of seeing their money at work while they are still alive.

Since Acorn was established in 2003 — thanks to our generous donors — we have distributed over $32m to the community, with over $6m distributed in 2026 alone. This funding has supported hundreds of charitable organisations that are important to our donors and are vital to our region's well-being.

For more information about starting a Charity Fund with Acorn,
please contact Matty Nicholson, Collective Giving Lead — matty@acornfoundation.org.nz