Giving Simple

Public Ancillary Fund

Making Giving Simple

Giving Simple

Welcome to Giving Simple Foundation

Launched in 2016, Giving Simple Foundation is dedicated to fostering philanthropy by offering a straightforward and cost-effective solution for individuals, families, and businesses. Our platform empowers donors to support the communities, charities, and causes that matter most to them.

How "Giving Simple" Works

Giving Simple Foundation functions as a personal philanthropic foundation, providing complete control over your giving strategy and structure. Unlike setting up an independent foundation, Giving Simple eliminates the administrative burden and compliance costs, allowing donors to focus on making a meaningful impact.

Who Can Benefit from Giving Simple?

Giving Simple is designed for:

- Entrepreneurs
- Next-generation family members
- Family business owners
- Families transitioning after a major liquidity event
- Individuals seeking tax-efficient giving solutions

About Giving Simple

Founded by Brad Scott, the visionary behind EWM Group, Giving Simple Foundation was created to inspire and facilitate philanthropy in Australia. Our mission is to provide a seamless, efficient and affordable philanthropic solution, supported by expert advice and guidance.

As a Public Ancillary Fund (PuAF), Giving Simple Foundation enables the establishment of individual sub-funds that can be personalised to reflect your values and giving strategy. The Trustee of Giving Simple Foundation handles all administrative, compliance, and reporting responsibilities at a fraction of the cost of setting up a Private or Public Ancillary Fund, allowing you to focus solely on your charitable contributions.

Is Giving Simple Right for You?

Giving Simple is ideal if you:

Want to enhance your philanthropic impact without managing a separate foundation.

Prefer to start small and grow your giving strategy over time.

Wish to focus solely on grant-making while leaving the administration, investment, and compliance to experts.

Want your charitable legacy to continue beyond your lifetime, regardless of family involvement.

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Key Features

Expert Advice

Personalised philanthropic guidance to maximise the impact of your generosity.

Immediate Establishment

A sub-fund can be set up instantly, with an immediate tax deduction (unlike Private Ancillary Funds, which can take up to 12 weeks).

Personalised Identity

Name your sub-fund (e.g. your family or business name). Grants can be made under this identity, or you can choose to give anonymously.

Flexible Giving

Donate now and decide on grants later, allowing your fund to grow over time.

No Setup Costs

Establishing a sub-fund comes at no cost to the donor.

Robust Compliance

A structured, secure, and regulated giving platform.

Important Information

Tax Benefits

All contributions to GivingSimple are tax-deductible and may be spread over up to five years (consult a tax adviser).

Donations are irrevocable and cannot be returned.

You can contribute at any time, including through your Will.

Fees & Investment Management

A maximum fee of 1% per annum (GST exclusive) applies to funds under management and covers all investment, compliance and administrative costs

The professionally managed investment portfolio aims to achieve consistent returns above approved benchmarks, balancing defensive and growth assets.

Eligible Charities

Grants can be directed to any of the 29,000 registered charities in Australia with Deductible Gift Recipient (DGR) Item 1 status.

A Public Ancillary Fund (PuAF) is a charitable trust that collects tax-deductible donations from the public and distributes funds to eligible charities. PuAFs are a great way for individuals, businesses, and communities to pool resources for greater philanthropic impact.
They must operate in accordance with strict regulatory guidelines to ensure transparency and proper fund distribution.
By donating to a PuAF, you can contribute to causes you care about while receiving potential tax benefits.
Whether you're looking to make a one-time donation or establish a long-term giving strategy, a PuAF provides an efficient and flexible way to support the nonprofit sector.

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Minimum Contributions

Establishing a Sub-Fund: Minimum initial contribution of $50,000.

Additional Donations: Minimum of $5,000 per donation.

Any variations are subject to the Trustee's discretion.

Setting Up a Sub-Fund in 4 Simple Steps

- **Complete an Application Form**
- **Choose a name for your sub-fund** (e.g. family, business, or community name).
- **Make an initial tax-deductible donation** and/or an additional tax-deductible Donation. Contributions can be made at any time by family, friends, or employees.
- **Start Giving!**

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Frequently Asked Questions

Q: Can I transition my Giving Simple sub-fund into a Private Ancillary Fund (PAF) later?

A: Yes. You can request the Trustee and ATO Commissioner to transfer your sub-fund balance into your own PAF in the future.

Q: Can I transfer my existing PAF into a Giving Simple sub-fund?

A: Yes! We can facilitate the transfer and liaise with your accountant or tax adviser for ATO/ACNC approval.

Q: What is the minimum annual grant requirement?

A: GivingSimple is required to distribute at least 4% of your sub-fund balance each year.

Q: How do I nominate charities for grants?

A: We provide a streamlined nomination process detailed in your welcome pack.

Q: What is the deadline for grant nomina tions?

A: While grants can be made throughout the year, we recommend that final nominations for each financial year should be submitted by 15 June annually.

Q: Can Giving Simple help with my philanthropy strategy?

A: Absolutely! We offer advisory services to help define your charitable goals and giving strategy.

Q: What repor ts will I receive?

A: You will receive an annual report on your sub-fund's performance, along with regular quarterly updates.

Giving Simple

A MEMBER OF THE EWM GROUP NETWORK

https://ewmgroup.com.au/givingsimple