

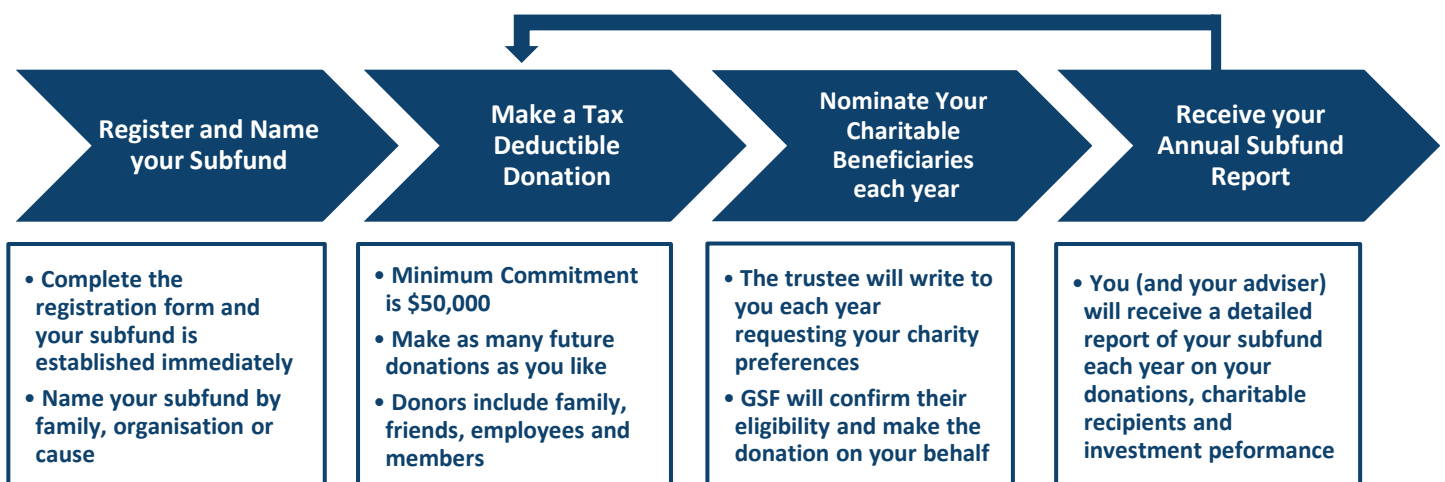
Subfund in GSF

Private Ancillary Fund

Public Ancillary Fund

	Subfund in GSF	Private Ancillary Fund	Public Ancillary Fund
Suggested Minimum Commitment	\$50,000	\$300,000 - \$500,000	\$300,000 - \$500,000
Establishment Cost	Nil	\$4,000 - \$6,000	\$5,000 - \$7,000
Establishment Period	Immediate	6-12 weeks	6-12 weeks
Ongoing Costs (p.a.)	1% of subfund balance	Approx. \$4,000 - \$11,000	Approx. \$4,000 - \$11,000
Responsible Persons	Not required	One	Majority of Trustees
Administration	Outsourced	Responsibility of Founder/Trustee	Responsibility of Founder/Trustee
Min Distribution Level	4% on opening balance of subfund each year	5% on opening balance of Fund each year	4% on opening balance of Fund each year
Grant-Making Criteria	Deductible Gift Recipient (DGR) – Item 1 charities	Deductible Gift Recipient (DGR) – Item 1 charities	Deductible Gift Recipient (DGR) – Item 1 charities
Time Outlay	Minimal	High	High
Can I accept donations from the public?	Yes	No	Yes
Can I Name My Fund?	Yes	Yes	Yes
Can I choose which charities I give to?	Yes	Yes	Yes
Do I have Investment Control?	No	Yes	Yes

GivingSimple Foundation – How does a subfund work?



Family Philanthropy Checklist

Yes / No

1.	Do you utilise any specialised vehicles to facilitate your giving? (i.e. Private Ancillary Fund, subfund in a Public Ancillary Fund etc.)																																																							
2.	When deciding who to donate to, do you seek input from others such as your spouse, children and other family members?																																																							
3.	Do you have an agreed set of criteria to identify the most appropriate philanthropic causes and charitable organisations?																																																							
4.	<p>What is most important to you when considering philanthropy? (5 being most important and 1 being least important)</p> <table border="0"> <tr> <td><input type="checkbox"/> Supporting Community / Causes</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td><input type="checkbox"/> Educating Family</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td><input type="checkbox"/> Family or Personal Values</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td><input type="checkbox"/> Family Engagement</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td><input type="checkbox"/> Tax Benefit</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td><input type="checkbox"/> Giving Back</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td><input type="checkbox"/> Leaving a Legacy</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td><input type="checkbox"/> Personal Fulfilment</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td><input type="checkbox"/> Other: _____</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> </table>	<input type="checkbox"/> Supporting Community / Causes	1	2	3	4	5	<input type="checkbox"/> Educating Family	1	2	3	4	5	<input type="checkbox"/> Family or Personal Values	1	2	3	4	5	<input type="checkbox"/> Family Engagement	1	2	3	4	5	<input type="checkbox"/> Tax Benefit	1	2	3	4	5	<input type="checkbox"/> Giving Back	1	2	3	4	5	<input type="checkbox"/> Leaving a Legacy	1	2	3	4	5	<input type="checkbox"/> Personal Fulfilment	1	2	3	4	5	<input type="checkbox"/> Other: _____	1	2	3	4	5	
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