

NEWS LETTER

WAKATIPU COMMUNITY FOUNDATION



Our youth philanthropy initiative, YPNZ, Generation Give, was launched at Wakatipu High in March. We have had some amazing guest speakers including Mayor Jim Boulton, as well as national and international philanthropists and consultants. We look forward to an inspirational next six months with these students as they learn vital nonprofit skills. We are so grateful for Roost Mortgage and Craigs IP for supporting this endeavour.

MESSAGE FROM THE CHAIR *Raymond Key*



To all of you who are passionate about the Wakatipu region, welcome to our latest update. I am somewhat reflective writing this note as March signified our 1st anniversary. The Foundation has come a long way thanks to the dedicated support of our trustees, ambassadors, founding partners and a growing number of passionate Wakatipu people who have been helping financially or with their time to enable us to help our Wakatipu community groups.

Our goal is to create endowment funds that help Wakatipu community groups forever. We do this by providing a service to people that care and who want to create their legacy here. We do the administration, research, investing, and reporting. People who set up endowment funds experience the joy of giving as our community groups receive increased funding and support.

So where is the Foundation at today?

I am proud to say we are fully operational and funded for at least the next three years. This is a major milestone for us. Our goal is to ensure we achieve a maximum pass through to local groups and keep our costs as low as feasible. I would like to acknowledge the fantastic support we have had from great people who share our vision of growing philanthropy and helping our community groups be more successful - our Friends of the Foundation: Berry & Co, Craig's IP, Findex, Deloitte, Gibbston Valley Winery, Mitchell Mackersy, Print Central, The Tindall Foundation, and Dick and Diana Hubbard.

As we start 2019, we have four endowments set up, and bold ambitions for 2019. Two of these I would like to highlight. Firstly, the Kate Moetaua Foundation. Many people in the Wakatipu had the pleasure of knowing and benefiting from Kate's help over the years. With her passing we have had great pleasure of assisting her family set up and run the endowment fund that Kate wished for. This endowment fund is run by Kate's family,

with the support of the Foundation and will start making grants to the youth in arts and sport this year.

The second endowment fund is Jennifer's initiative, called Generation Give Youth Philanthropy which focuses on inspiring the youth of today to engage, help, and learn about our local community groups. With the generous support of Roost and Craig's IP this program is run by three youth mentors and has accepted 20 Wakatipu High School applicants who will be part of a 20-week course learning about philanthropy, our community groups, running a not-for-profit and interacting with some of the most inspiring philanthropists in New Zealand. What could be better than educating the youth of today about the importance of community and giving back? Our vision is to take this program nationwide and are receiving significant interest in supporting this initiative.

Finally, I would ask you to reach out to Jennifer, myself, or our other trustees if you would like to learn more about what we do, how you could help or know someone who we should be having coffee with!



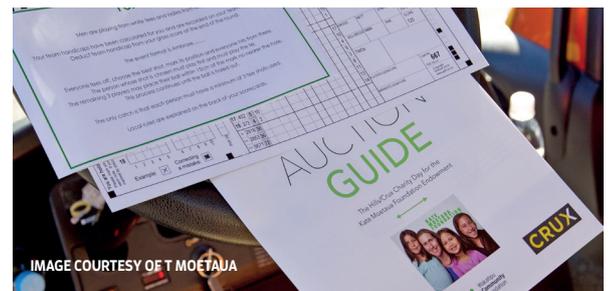
OUR YEAR SO FAR...



Wakatipu
Community
Foundation

Issue No.2 / Autumn 2019

- Generation Give Youth Philanthropy Programme established with \$10k to be awarded at our September Gala
- 100% operational funding for the next three years
- 4 endowments established
- Facilitated a \$45,000 fundraiser for the Kate Moetaua Foundation Endowment
- 30 coffee catchups, 4 presentations to professional advisor groups, 2 presentations to charities, 1 donor reception
- In addition to our Generation Give grants, our gala we also will be incorporating the community philanthropy awards, celebrating our community heroes.
- A special thanks to Think Creative, Inc, a Florida branding firm for producing the YPNZ and Generation Give logos for us pro bono.



“ I cannot thank Jennifer and everyone from the Wakatipu Community Foundation enough for all they have done for the girls and me since Kate’s passing in November last year.

It was really important for us to establish Kate’s Foundation as quickly as possible as this was one of her final wishes. This could not have been possible without the amazing help of the Wakatipu Community Foundation. At such a tough time for the family, they were able to make this as simple as possible for us.

We look forward to a long relationship with the Wakatipu Community Foundation. ”

T Moetaua



SAVE THE DATE

ANNUAL GALA

CELEBRATING GENEROSITY
IN THE WAKATIPU
14 SEPTEMBER 2019

Please save the date for our Inaugural Annual Gala where we will be celebrating community generosity with our local philanthropy awards and highlighting our Youth Generosity Programme, Generation Give.

...AND MORE TO COME

Growth:

- \$1 million in proposed endowments
- A goal of 10 endowments for the year: with 4 endowments started, 3 in process, we are well ahead of our 2019 goals!

Impact:

- Continued collaboration with Wakatipu charities
- In depth discussions about establishing pass through grants and resettling trusts for ease of administration and expertise.
- Grants given out this year through the all four of our endowments this year, including the Generation Give and the Kate Moetaua Foundation Endowments. Grant criteria and more information provided in the coming month

Promotion:

- Provide in house seminars to all major accounting, legal and financial advisors
- 200 more coffees to explain how we can help you start your legacy!
- Inspiring generosity in the Wakatipu through our events and culminating with our Annual Gala 14 September

Capacity:

- Continued governance work and completion of Community Foundations of New Zealand and Tindall Foundation Milestone Programme Stage 2
- Sector advisors’ breakfast 12 June

CHARITY PROFILE

QUEENSTOWN TRAILS TRUST

We are the Queenstown Trails Trust. The charity making it easy for you to ride and walk in Queenstown.

We have a vision to "Connecting our community and inspire adventures". In 2025 we believe the Queenstown Trail network will consist of a complete series of commuter and recreational trails within the Queenstown Basin, easing traffic congestion and linking communities to Queenstown's workplaces, schools, attractions and a plethora of trails from easy to downhill, backcountry and beyond.

Your support will help us reach our vision. Become a Friend of the Trust today for less than the cost of a couple of coffees.



CEO UPDATE

Jennifer Belmont

What a fantastic start to the year! Although I was a bit concerned after the first week of the new year when I'm bucking in the gate January 2 to get things done. I have to be better about doing the kiwi summer thing and relax in January. But, wow, after a few lazy summer weeks, our momentum sure kicked in and hasn't stopped!

Over the summer I thoroughly enjoyed organising our youth philanthropy initiative (YPNZ) with our very inspirational youth mentors, Hugh Taylor, Beatrice Onions, and Chris Belmont. I'm immensely proud of all they have achieved in getting this programme off the ground. The YPNZ team started the curriculum with a special session with Mayor Jim Boulton. Emotions were high during this first session as it happened during the Christchurch attacks. Mayor Boulton astutely pointed to the New Voices for Good tagline of YPNZ and empathetically stated that "the only way to counteract evil was by good." Yes, indeed. Our goal in establishing this initiative is to provide the tools and skills for the next generation of philanthropists to do just that...good. Over the next month, we will welcome three of our Wakatipu Community Foundation ambassadors to speak to the students, Sir Eion Edgar, Kaye Parker, and Mark Taylor. All of whom have had a tremendous impact on local charities. I am continually inspired not only by our guest speakers but also by the students in their probing questions and thought-provoking dialogue. Beginning in May, we will be selecting the grant criteria, and then we will be asking local charities for RFPs. Students will then choose charities to work with and then ultimately award the grants in September.



YPNZ
New Voices for Good

GENERATION GIVE
a programme of YPNZ

We were also privileged to facilitate the growth of the Kate Moetaua endowment through The Hills/Crux Charity golf day. An extraordinary group of donors, participants, and sponsors raised \$45,000 for the fund, cementing the legacy Kate inspired. What a beautiful thing T and the girls are doing and, I am honoured to be able to help them.

On the administrative front, we warmly welcome new trustees Ann Lockhart and Ron Mackersey and say an enormous thank you to founding trustee Vickie Onions, who has stepped down as a trustee but remains in the family as one of our ambassadors. We will miss Vicki's incredible spark but, we are very grateful for her new role with us. Sir Eion and Lady Jan Edgar hosted an intimate gathering for us in February at their gorgeous home and then further down the social event track, we will be celebrating the youth philanthropy programme as well as community philanthropy at our gala in September. Rest assured, with our trustee

Simon Green chairing the gala committee, the celebration will be the must-do local event of the year.

Momentum continues to build for establishing individual, corporate, and charity endowments with us as well as resettling trusts. The ease, efficiency, sustainability, and costs savings that the community foundation model brings is widely recognised, making it the fastest growing form of philanthropy in the world. We look forward to chatting with many of you over the next few months to show you how we can help you create your or your organisation's lasting legacy.



Our Trustees: Raymond Key, Jonathan Gurnsey, Andrew Davis, Jennifer Belmont, Simon Green, Ann Lockhart, Ron Mackersey
Our Ambassadors: Sir Eion Edgar, Mark Taylor, Bill Holland, Kaye Parker, Craig Robins, Vicki Onions

Article by Peter Newport, Reprinted Courtesy of Crux



Unexpected but Real - The Young Philanthropists

[Become a supporter](#)

by **Peter Newport** : Feb 8,2019

In what many people might see as a highly unusual, but welcome, move a group of Queenstown teenagers have set themselves up to teach young people how to be - philanthropists.

Usually philanthropy is associated with older members of the community who might have just sold a business or invented the next big thing in Silicon Valley, but Generation Give is an entirely new approach.

The idea is to teach Wakatipu High School students how to become the next generation of community and non profit leaders.

The Generation Give team of three former WHS students is being mentored by the [Wakatipu Community Foundation](#) who will provide guidance on governance, tax law and the fine art of extracting money from the community for worthy causes. As anyone who has ever been involved with fund raising will tell you - it's not easy.

Hugh Taylor, Beatrice Onions and Chris Belmont are not nervous about the size of the task, instead seeming to be genuinely excited at the challenge of it all. WHS principal Steve Hall backs the idea, telling Crux "This will be a huge character building adventure for the team and it will also involve current students at the school who will help them make decisions on which are the most deserving causes to benefit from this initiative."

In addition to the support from the Wakatipu Community Foundation, two local sponsors have come on board to give the Generation Give philanthropy fund a kick start. Craigs Investment Partners and Roost Mortgage Brokers have both contributed seed funding that will underwrite the Generation Give campaign.

The target total for year one is around \$10,000 rising to \$20,000 in years 2 - 5. The Generation Give project is a pilot for a national programme to be known as Youth Philanthropy NZ. Many prominent local supporters will also be part of Generation Give project including Sir Eion and Lady Jan Edgar, Mayor Jim Boulton along with Dick and Diana Hubbard.

Article by Georgia Merton, Reprinted Courtesy of Crux



\$45,000 plus - Kate's fund is the winner for The Hills/Crux Charity Day

[Become a supporter](#)

by **Georgia Merton** : Apr 6,2019

Over \$45,000 has been raised for the Kate Moetaua Endowment Fund, as both members and the general public played on the The Hills golf course today. In a recent update, The Hills Director of Golf, Craig Palmer, told Crux: "I'm thrilled with the result and very proud of all who were involved including Crux - I'm sure Kate is smiling down from above. It turned out better than I ever imagined."

It was a bluebird Queenstown day, and proceeds were already sitting at over \$20k before players teed off. In March, over three thousand people voted for their cause of choice for this year's The Hills/Crux Charity Day, and there was overwhelming support for the fund set up in memory of local teacher, Kate Moetaua.

A well-known and beloved drama teacher, Kate dedicated her life to opening up the world of performance to young people, and helping them find their way both on and off the stage. Tragically, she died of cancer in November 2018, leaving behind her husband, T (Teaukura), and three daughters, Anika, Aya and Malia.

To honour one of Kate's final wishes, the fund has since been set up by the Wakatipu Community Foundation to support the youth of the Southern Lakes in the fields of sports, arts and culture. With the auctions still yet to run, the total proceeds from the day are yet to be tallied up, but nearly a quarter of the initial amount was donated by members who weren't even playing today.



"Inspiring a culture of giving to create a vibrant and engaged community in the Wakatipu."

What do you want for your community?

Become a Wakatipu Community Foundation donor.

Donor funds are invested in perpetuity, and interest from the funds are distributed annually to local community groups. The capital remains intact and the giving continues forever.

ACCREDITED AND SUPPORTED BY:



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MITCHELL MACKERSY LAWYERS

For more information please visit www.wakatipucommunityfoundation.co.nz or our Facebook page: [f Wakatipu Community Foundation](#)