

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
Philanthropy advice as sole primary service offering and philanthropic structure specialists											
Australian Philanthropic Services	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	https://www.australianphilanthropicservices.com.au/
GoodWolf Partners	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	www.goodwolf.com.au
Giving Connect	Advice only	N	N	N	N	Y	N	Y	N	National	www.givingconnect.com
Higher Purpose	N	N	N	N	N	N	N	Y	N	National	https://higherpurpose.com.au/
JM Philanthropy	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	https://www.jaqminns.com.au/philanthropy , www.granttoolbox.com.au

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Tanarra Philanthropic Advisors	N	N	N	N	N	N	N	Y	N	National	https://tanarraphilanthropic.org/
Community Foundations											
Australian Communities Foundation	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	https://www.communityfoundation.org.au/giving/structured-giving
Accounting and Business Consultancy Firms											
ANZ	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	https://www.anz.com.au/private-banking/services/
Perpetual	Y	Y - (b) & (c)	N	Y & Y to portability	Y	Y	Y	Y	Y	National	https://www.perpetual.com.au/financial-advice/philanthropy-with-impact , https://www.perpetual.com.au/insights/the-philanthropy-toolkit-maximum-impact-philanthropy
PwC	Y	Y - (c)	Y	N	Y	Y	Y	Y	Y - but the drafting of wills is outsourced)	National	https://www.pwc.com.au/pwc-private.html , https://www.pwc.com.au/charities.html
Legal Support											
Gilbert & Tobin Lawyers	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	https://www.gtlaw.com.au/expertise/charities-social-sector
Milner + Huang	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	https://www.milnerhuang.com.au
Prolegis Lawyers	Y	Y	Y	Y	Y	Y	N	N	Y - advising on bequests and philanthropic gifts	National	https://www.prolegis.com.au/

Last updated November 2024

*Note: This is not an exhaustive list. This information is frequently updated
Organisations may appear under more than one category if they provide the services*

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Trustee Companies											
Australian Executor Trustees	Y - all	Y - all	Y	Y	Y	Y - for funds we act as trustee or custodian for	Y	Y	Y	National	https://www.aetlimited.com.au/home .
Equity Trustees Ltd	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	https://www.eqt.com.au/philanthropy/equity-trustees-charitable-foundation
Mutual Trust	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 alice.walter@mutualtrust.com.au ; Senior Foundation Manager – Melbourne, Adelaide – Rachel English Rachel.english@mutualtrust.com.au ; Senior Foundation Manager – Sydney – Sarah Metcalf sarah.metcalf@mutualtrust.com.au
State Trustees	Y	Y - (a), (b), (c)	Y	Y	Y	Y	Y	Y	Y	Victoria	https://www.statetrustees.com.au/philanthropy-and-charitable-giving/
Wealth and Asset Managers											
ANZ	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	https://www.anz.com.au/private-banking/services/
Cooper Investors	N	N	N	N	N	N	Y	N	N	National	www.cooperinvestors.com
Elston Asset Management	Y	Y - (c) all services	Y	Y	Y	Y	Y	Y	Y	National	www.elston.com.au/philanthropy
Escala Partners	Y	Y - (c)	N	N	N	Y	Y	Y	We work with selected experts in this field for our Private Clients	National	www.escalapartners.com.au
Evans & Partners	Y	Y – (a) set up only and (c) set up, admin & investment management	N	N	Y	N	Y	Y	Y	National	https://www.evansandpartners.com.au/

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Goodmans	Y	Y - (a) (b) (c)	Y	Y	Y	Y	Y	Y	Y	National	https://www.goodmanwealth.com.au/philanthropy/
Hewison Private Wealth	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	https://www.hewison.com.au/
Jana Advisors	N	N	N	N	N	N	Y	N	N	National	https://jana.com.au/
JBWere	Y	Y - advice only	Y - advice only	Y - set-up, admin and investments portability permitted	N	N	Y	Y	N	National and New Zealand	https://www.jbwere.com.au/for-purpose-organisations
Keystone Private	Y	Y - (c)	Y - (c)	Y - (c) and Y portability permitted	Y - (c)	Y	Y	Y	Y	National	https://www.keystoneprivate.com.au/
Knightsbridge Wealth Management	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	https://www.kbwm.com.au/#home
Koda Capital	Y	Y - (c)	Y	Y	Y	Y	Y	Y	N	NSW, VIC, QLD	https://kodacapital.com/our-services/philanthropy-social-capital
Morgan Stanley Wealth Management	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	https://adviser.morganstanley.com.au/michael.willett https://adviser.morganstanley.com.au/biljana.pavlovic

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				PAF in the future.							
Perpetual	Y	Y - (b) & (c)	N	Y & Y to portability	Y	Y	Y	Y	Y	National	https://www.perpetual.com.au/financial-advice/philanthropy-with-impact , https://www.perpetual.com.au/insights/the-philanthropy-toolkit-maximum-impact-philanthropy
PwC	Y	Y - (c)	Y	N	Y	Y	Y	Y	Y - but the drafting of wills is outsourced	National	https://www.pwc.com.au/pwc-private.html , https://www.pwc.com.au/charities.html
Viridian Financial Group	N	N	N	Y - portability permitted	N	N	Y	N	N	National	www.viridianadvisory.com.au