

## HELPING CHARITIES INVEST FOR THE FUTURE



Craigs Investment Partners can help your charity invest for the future so that you can concentrate on what really matters – just like we do for Auckland SPCA.



“To encourage the humane treatment of all animals and to prevent cruelty that may be inflicted upon them.”

### The Challenge

Auckland SPCA is a non-for profit organisation that promotes the prevention of cruelty to animals and shelters homeless animals until hopeful adoption. They are a charity, receiving no government funding and relying on the goodwill of donators to fund the running costs of the organisation.

The Auckland SPCA, through the Auckland SPCA Trust, identified the need to invest in the financial future of the organisation through the smart allocation of surplus funds. The SPCA wanted to create a ‘self-generating’ fund that would provide a consistent income stream that would be used for re-investment as well meeting some of the burden of annual operating costs. This is when they approached Craigs Investment Partners for advice.

### Securing the future

The North Shore branch of Craigs Investment Partners worked with Auckland SPCA to develop a clear investment strategy to achieve the Trust’s financial objectives. Due to the long-term investment timeframe of charitable Trusts and their exemption to tax, a different investment strategy from individual investors is essential to maximise potential returns.

Our service to Auckland SPCA also ensured that the Trustee’s were aware of, and could manage, their obligations to the Trust. Obligations such as ensuring that investments met the requirements of the Trust Deed, to act in the best interests of present and future beneficiaries and to keep appropriate records of their investments and transactions.

This expertise in dealing with the finer details of the Trusts obligations, combined with a comprehensive portfolio management solution, provided the perfect formula for Auckland SPCA to confidently invest in their financial future.

*“Securing the long term future for the SPCA is of vital importance in these ever changing financial climates, and the Society is in good hands with its investments so ably managed by Craigs Investment Partners”*

Bob Kerridge - Chief Executive of Auckland SPCA

### Benefits for Trusts when investing with Craigs Investment Partners

**Experience** – We manage over \$270 million worth of investments for over 120 Charities in New Zealand.

**Expertise** – We understand the obligations of Trustees when investing Trust money and ensure these obligations are always met and that actions taken are always in the best interest of the Trust.

**Service** – We offer a full-service personalised approach to investing based on a proven investment philosophy and backed by our research. Our portfolio management services can ensure records and reporting are compliant with the legal obligations of Trusts.

**Results** – We have a proven track record of achieving strong absolute returns.