

Charitable Trusts price list

Establishing a Charitable Trust allows you to create a lasting legacy which can support the causes or organisations that mean the most to you. Registered Charitable Trusts will generally be exempt from income tax and can operate for defined periods or in perpetuity.

There are two types of Charitable Trust – one that is set up via a Deed and commences within your lifetime, or one that is set up via your Will and operates after you pass away.

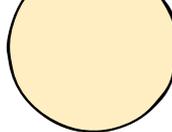
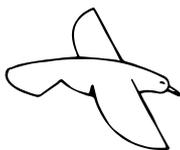
1. Charitable Trust Deed – A Trust that is set up and active during your lifetime

The cost of setting up a Charitable Trust via Deed within your lifetime will depend on the complexity of the Trust, and is based on hourly rates with minimum charges.

Ongoing costs for operation of the Trust will depend on the work you want us to do – we can do some or all of the work to operate your Trust.

Set up costs	Fee (Incl. GST)
Establishment meeting and proposal (Payable whether Trust proceeds or not)	from \$773.00
Deed & Trust Establishment – set up work	hourly rates
Charities Services - Trust Registration	from \$335.00
Operating Costs	Fee (Incl. GST)
Income Handling Fee – calculated on gross income collected	5% + GST if any
Ongoing work to manage the trust	hourly rates
Charities Services Annual Return (Additional charges are payable for Charities Services external fees)	from \$323.00





2. Charitable Trust Will – A Trust that is set up via provisions in your Will and operates after you are gone

The cost of setting up a Charitable Trust Instructions via Will is included in the cost of making or updating your Will.

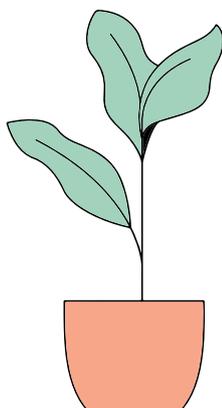
Ongoing costs for operation of the Trust will vary depending on the complexity of your Trust. The work will include, but is not limited to: managing your Trust, compliance, preparation of annual accounts and managing your Trust assets. These costs are paid for by the Trust.

You only pay for the work we do

You won't be charged for a full hour if the work required takes less time.

Our hourly rates are priced from \$296.70 per hour for an Associate Trustee to \$518.65 per hour for a Senior Solicitor. The hourly rate that applies to a particular task depends on the expertise, experience, complexity of the work involved and the most effective and efficient management of the task. Our specialists will tell you their hourly rates and, if requested, will give you an idea of the fee for a specific task, when they meet with you.

There will also be costs for disbursements such as; office costs, photocopies, faxes and postage.



Set up costs	Fee (Incl. GST)
Charitable Trust instructions – included in the costs of making or updating your Will	see wills price list
Operating Costs	Fee (Incl. GST)
Charities Services – Trust Registration	from \$335.00
Annual Management Fee – calculated on gross value of assets under administration	0.2% + GST
Income Handling Fee – calculated on gross income earnings	5% + GST if any
Ongoing work to manage the Trust	hourly rates
Charities Services Annual Return (Additional charges are payable for Charities Services external fees)	from \$323.00

How we can help you to establish a lasting gift

With a Charitable Trust, you can decide who benefits and how. Public Trust can assist you to set up a Charitable Trust within your lifetime or as part of your Will.

As Trustee, our role is to ensure your wishes are carried out within your lifetime or after you are gone. Every Trust is different, so the cost depends on the complexity of the Trust and what you would like done.

Once you have decided what you would like to achieve, we can help structure your giving and provide you with an estimate of costs.

If you would like to know more, please call us on 0800 371 471.

The fees and charges in this guide are inclusive of GST (except where stated otherwise) and are subject to change. Fees are stated as of 1 July 2024. Please check with us to ensure the information is current. This guide is for information purposes only. Its content is intended to be of a general nature and does not take into account your individual circumstances. Please contact Public Trust or seek independent assistance if you want to find out how this information applies to you.