

# The Milford Foundation Investing in future generations

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MILFORD  
FOUNDATION

INVESTING IN FUTURE GENERATIONS  
TE WHAKATŌ KĀKANO MŌ NGĀ REANCA HOU



## *Our purpose — to invest in the future of Aotearoa, creating opportunities for generations to follow.*

With over 27,000 registered national charities, sharp focus is required to make a difference. Our mission is to strengthen New Zealand communities through the lenses of youth, education and the environment – because our future depends on these overarching pillars.

Through a combination of our generous donor community, investment expertise, a commitment to efficiency, effectiveness and transparency, and strong partnerships, we can – and will – make a meaningful impact for New Zealand’s future generations.

Milford Asset Management is committed to fully supporting the Foundation and as such has provided the first (and significant) opening donation. In addition, Milford will fund all operating costs of the Milford Foundation. This ensures that every dollar donated will be granted to the charity partners the Milford Foundation works with. We look forward to making an impact together and welcoming you as a member of the Milford Foundation.

**Our edge – growing our koha/donations through investment expertise and partner oversight.**



Milford Asset Management has years of philanthropic experience, including partnerships with 0800 What's Up, the Graeme Dingle Foundation, MoneyTime and Blind Low Vision NZ. Drawing on this experience, the Milford Foundation is an evolution of a strong and positive track record.

Moreover, the Milford Foundation has an edge in its ability to create a material impact in our community by leveraging Milford Asset Management’s financial resources, investment expertise and commercial discipline. By adopting an ‘investment research’ lens in selecting our charitable partners and then ongoing engagement to ensure the expected impact is being achieved and reported on, we will make the overall impact to the community far more certain.

# Our philanthropic pillars

*New Zealand is one of the most beautiful countries on earth. Small, remote and relatively young, it still packs in a huge amount of history, culture and innovation for Kiwis and the world to enjoy.*

However, New Zealand also faces many challenges. A widening poverty gap is a major contributor to systemic issues in education, healthcare and housing. Aotearoa has a dependency on the environment for tourism revenue making our country vulnerable if we don't address growing environmental problems.

The Milford Foundation has been born out of a desire to make a significant positive impact for our communities and help build a stronger New Zealand. To make the greatest impact possible, we are focusing our efforts in three core areas: youth, education and the environment – while retaining the funding ability to support initiatives that address one-off challenges that New Zealand may face, as and when they arise.



## YOUTH

Our rangatahi and mokopuna are the future leaders and guardians of Aotearoa. We work with charitable partners who see the value in our youth, harnessing their energy, and providing them with opportunities to play an integral role in the growth of our country.

## EDUCATION

A good education is the foundation of a thriving society, empowering young New Zealanders to realise their dreams and ambitions. We support those who work to enhance education and provide knowledge for the youth of Aotearoa, allowing them the freedom of choice and a prosperous future.

## ENVIRONMENT

The environment plays a vital role in Aotearoa. That's why we need to ensure its sustainability for generations that follow. The Milford Foundation is committed to working with like-minded charitable partners who work hard to safeguard our natural environment.

# We live by our values

The Milford Asset Management team behind the Milford Foundation adhere to a set of values called 'The Milford Way'. This is central to our culture and forms the building blocks of our interaction with clients and the community.



# Our guiding stars

The Milford Foundation aims to strengthen communities within Aotearoa, and be a leading charity in New Zealand in relation to transparency, effectiveness, efficiency and quantifiable impact for our donor members and charity partners.

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Investment expertise



Commitment to efficiency and effectiveness



A focus on transparency



Strong and meaningful partnerships



An innovative approach to change



Best practice principles at every step

A meaningful impact for New Zealand's future generations

## Papatūānuku gives birth to all things.

Tu-te-raki-whanoa reached excellence when he carved out Piopiotahi and the mighty Rāhotu. Milford, our name, was born from this place of abundance as we strive for a culture of excellence.

The Milford Foundation now builds on the culture we have created, to ensure that future generations in Aotearoa have the opportunity to also grow and flourish.

Rāhotu is our logo, a powerful symbol of stability and strength, providing a safe haven in this special part of the world.

# Why donate to the Milford Foundation?

## #1 We hold ourselves to account



### We do this by:

#### The values we adopt – the Milford Way

The employees in our funds management business adopt the Milford Way values and we have carried these strong principles through to the Milford Foundation.

#### Giving back from Milford's success

Milford has been supporting charity partners for many years. However, with an overwhelming need for more support, we aim to achieve an even greater impact for the communities of Aotearoa.

The Milford Foundation will make a discernible impact with its charity partners working through our Youth, Education or Environmental lens. This extends the work we have done with charities since the inception of Milford and aligns well with the values we live by – for both our employees and our clients. The Milford Foundation will enable social impact to be amplified.

#### Through utilising our rigorous investment expertise and approach

Milford has a proven track record of using its investment expertise and active management approach to materially grow the capital of our clients. This same long term investment approach in managing the Foundation's investments will be applied, maximising the social return on donations received and ensuring the longevity of the Milford Foundation.

## #2 We will work alongside our partners to ensure impact

Many Foundations make grants to charities but more in an 'optimistic, please spend it wisely' kind of way. The Milford Foundation is not one of those.

In our funds management business we carefully research companies before making any initial investment. We subsequently work hard to continually engage with and assess those companies, ensuring we understand how they can maximise their potential. Accordingly, the Milford Foundation will use Milford's tried and trusted investment rigour and due diligence process in firstly finding and selecting appropriate charities to support our three pillars of Youth, Education and Environment.

Then, importantly we will provide support in the form of financial resources, but also in the giving of our time and ongoing stewardship.

Milford will also cover all expenses incurred by the Foundation, so that every dollar paid to the Foundation is received by the recipient charity partner.

## #3 We give with our hearts AND our heads

We know that giving to charities is a part of the Kiwi way, and often it is our emotion that drives us to donate and be part of a recipient's journey.

But as a custodian of donations to pass on to those who need them, we are also committed to using our analytical expertise to achieve the maximum social return for the donations we manage.



### Our point of difference will be to maximise social return through:

- Milford Asset Management funding all the expenses of the Milford Foundation, therefore every dollar donated will ultimately be granted to our charity partners.
- The Milford Foundation will strive for efficiency, effectiveness and transparency as best practice in the philanthropic sector.
- 50% of every dollar donated will be granted, while the remaining 50% will be invested in a capital growth fund for future granting. We will use our investment expertise, to grow and manage these funds - providing a platform of sustainable investment funding for future impact.
- The Milford Foundation will ensure clear communication back to donor Members who choose to be kept informed as to how donations are making a positive impact.
- The Foundation will look to collaborate with others in the sector, potentially leveraging each dollar donated.

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*Ensuring the youth of Aotearoa are given the opportunity to have a quality education, participating in the growth of a sustainable future.*



Join the Milford Foundation TODAY  
and donate by direct bank transfer  
or securely with credit card. Visit our  
website to do it now.

[milfordfoundation.co.nz/donate](http://milfordfoundation.co.nz/donate)



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