

# FROM CONVERSATION TO ACTION

Collective Manifesto Pty. Ltd.



## PHILANTHROPY FOR PROFESSIONAL ADVISORS

Put simply – **clients want to talk about philanthropy & there's increased interest** in giving.

### Why Discuss Philanthropy With Your Clients

Giving discussions add to client relationships, beyond delivering investment returns by:

- ✓ Delivering **steady, secure FUM** - corpus is irrevocable
- ✓ **Deepening relationships**, showing you genuinely care
- ✓ Engaging **female clients & the next generation**
- ✓ **Differentiating you** in a competitive market
- ✓ Creating **engagement opportunities** for you alongside your clients
- ✓ Serving as an **investment education tool** - crucial in wealth transition & family involvement

### When To Raise Philanthropy

Look for these flags to help you raise giving with your clients:

- **Lived experience** – for them, their family or someone they love;
- **Bequests** in their will – an **interest in giving** indicates an opportunity to ‘**give while you live**’;
- **Surplus funds** – giving provides a greater purpose for their wealth;
- **A windfall** - meaning they have a **capacity to help others**;
- **Tax liability** – giving presents **significant tax benefits**; and
- **Client annual review** – especially alongside retirement & succession discussions.

## How To Start The Discussion

Spoiler alert ... it isn't as complex as you might think!

1. Ask your client '**Do you support any causes or charities?**'. With over 80% of Australian's giving to charity, it's likely your client is one of them.

2. Use **open-ended questions** - if a client has donated or volunteered, ask them about it. Some prompts are:

- What **social issues** are you passionate/ concerned about?
- What **motivates you** to give to charity?
- What was **special about the cause or charity** you supported?
- Is giving **a value you'd like to share** with others?

3. Include philanthropy as **part of your initial & ongoing client discussions**.

Advisers who successfully integrate giving out it on their meeting agendas.

4. Speak About **Legacy**

Conversations about legacy & long-term plans are **particularly aligned with giving**. It's about creating connection within families & their communities, & making a **meaningful impact**.

5. Outline the **Tax Benefits**

Finally, incorporate philanthropy in tax discussions. In Australia, the tax benefits of giving to DGR charities are currently uncapped, making it a great topic to **include in tax planning discussions**.

You **don't need to be experts** in giving, but it's important to know the **best time to raise it**, understand the **options**, and **who to connect client's to**

**Let's Work Together**

**Contact us on +61 413 805 327 for a free Discovery Call**



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# GIVING COMPASS

Your Bespoke Approach  
to Achieving Impact



**Giving, when done well, can be incredibly rewarding.**

**But with so many charities & social challenges, how do you choose who to support, & know they'll use your money well?**

## WHAT IS THE GIVING COMPASS?

The *Giving Compass*, drawing on over two decades experience working with some of Australia's most successful families, is a **unique & bespoke approach** to help you **define, refine & focus** your giving.

## WHAT ARE THE BENEFITS?

- ✓ Creates **family cohesion & unites** generations
- ✓ Strengthens & demonstrates **family values**
- ✓ **Establishes your legacy & inspires others** to get involved
- ✓ **Maximises** your charity impact
- ✓ **Creates engagement** through volunteering, learning, & events
- ✓ **Builds key skills:** decision making, conflict resolution, listening & negotiation
- ✓ Cultivates **empathy, social responsibility**, awareness of privilege & the importance of giving back
- ✓ Encourages **long-term thinking** & sustainability
- ✓ **Increases tax effectiveness** through giving strategies

**Contact Sarah Metcalf, Founder, on 0413 805 327 for a free Discovery Call**

**[www.collectivemanifesto.com.au](http://www.collectivemanifesto.com.au)**





# GIVING MATCH

Maximising your Impact

Choosing a charity to support should be simple.

How do you find charities where your giving makes the most impact?  
Ones that genuinely make a difference, but aren't easily found?

## WHAT IS THE GIVING MATCH?

The ***Giving Match***, leveraging our extensive network of domestic & international charities built over two decades, connects you with **innovative organisations doing incredible work** — ones you probably wouldn't find on your own.

## WHAT ARE THE BENEFITS?

- ✓ **Ensures Impact:** Knowing your money is **spent well & maximising** its impact
- ✓ **Bespoke Recommendations:** Based on **your values, passions, & giving goals**
- ✓ **Streamlines Giving:** Provides you a curated selection of **impactful charities & simplifying** your giving experience
- ✓ **Uncovers Hidden Gems:** Introduces you to **lesser-known, incredible** charities
- ✓ **Provides Confidence:** With rigorous due diligence, you're assured of **transparency & trust** with your grantees
- ✓ **Supports Innovation:** Through organisations tackling social issues in **unique, creative & effective ways**, driving meaningful change
- ✓ **Fosters Deeper Engagement:** Strengthens connection between donors & charities, leading to more **learning & connection** opportunities

Contact Sarah Metcalf, Founder, on [0413 805 327](tel:0413805327) for a free Discovery Call

# TIME, TALENT AND TREASURE

## Collective Manifesto



**In a rapidly changing world, both in Australia and globally,  
it can be hard to know what to do to help**

*Collective Manifesto* recently held the first in a series of events, *From Conversation to Action*, focused on the **transformative power of philanthropy** to create change.

The event featured an **Expert Panel** of two passionate philanthropists sharing their experiences and the change they want to see but hadn't (yet), alongside Annabelle Daniel (OAM), Chair, Domestic Violence NSW and CEO, Women's Community Shelters. It was an **honest and at times raw conversation** about one of Australia's key social issues: Violence against Women.

*Conversation to Action* was created to **help people move from discussing social causes to actively doing something about them**, in one or more of the following ways:

- Volunteering - **supporting charities in their work helping others**, whether it's serving at food kitchens, sorting clothes or assisting with whatever else they need. **All year around** - not just at Christmas when they're flooded with volunteers, but also **during those critical times** when they can **lack the hands they need**;
- Providing skills - charities often require assistance with **tasks like administration, operations or mentoring staff**. These needs are ongoing, so **offering consistent support over time** is far more valuable than short-term or one-off assistance;

- Financial support - any form of **giving is valuable, provided it's thoughtful and to charities that will use your money well**. While this may seem straightforward, it can be more complex than it appears. It's at **the heart of the work we do**, so please reach out if you need guidance;
- Use your voice - **learn about causes** that matter to you, then **share your knowledge with others** by starting conversations and passing along what you've learned. Many people may not be aware, and social issues impact us all. A **single conversation can inspire others to join our collective effort** to make things better;
- Get on board - even something as simple as **signing a petition** from organisations like [change.org](https://change.org) can have an impact. You can also **send on relevant petitions to family and friends**, then let them know when something has been successful; and
- Talk to the next generation - our **future leaders will face some significant challenges** including climate change, housing and mental health. Start **engaging them in social issues** by **sharing your perspective on where we've been, where we are today and where you think we might be headed**. So they are better equipped and inspired to take action. **Pass on your values** to support them in making a difference.

## About Collective Manifesto

*Collective Manifesto* **guides and supports families and organisations to give to charities better, and with more impact**. We do this with significant sector expertise to help inform their choices and **create purpose, impact, and joy**.

Philanthropy isn't just about giving back - it's about **shaping a family legacy, creating connectivity within families and their communities, and making a meaningful impact** for generations to come.

## Let's Work Together

And as another year comes to an end, we want to **thank you for your ongoing support** of *Collective Manifesto* and **wish you the best for 2025**. We look forward to seeing you in the New Year!

*Sarah*

Sarah



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