

ENGAGED PHILANTHROPY
REVIEW 2024

GROWING OUR GIVING



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Growing our giving now and in the future

EXECUTIVE SUMMARY 2024

FOR MORE THAN 100 YEARS PERPETUAL GUARDIAN HAS SUPPORTED GENEROUS KIWIS IN THE STEWARDSHIP OF THEIR GENEROSITY BOTH DURING AND AFTER THEIR LIFETIMES. ALONGSIDE OF GIVEALITTLE AND THE RECENT ACQUISITION OF TRUSTEES EXECUTORS WE ARE VERY PROUD TO BE NEW ZEALAND'S PRE-EMINENT PROVIDER OF PHILANTHROPIC SERVICES.

As we navigate the complexities of 2024, philanthropy continues to play a pivotal role in addressing pressing societal challenges. The dual impact of the after effects of the global pandemic and escalating climate concerns underscores the need for targeted and strategic philanthropic efforts.

In this evolving landscape, Perpetual Guardian remains committed to advancing the practice of trustee supported philanthropy with a focus on effective outcomes and innovation as our world alters around us. Our extensive experience in structuring, investing, and grant-making allows us to apply a sophisticated approach to managing and directing philanthropic resources. We are dedicated to enhancing our model through rigorous evaluation, integrating emerging best practices, and responding

dynamically to the needs of the communities our clients funding serves.

This year's Engaged Philanthropy Review highlights our progress and achievements in driving meaningful change in line with the hearts intentions of our clients. Our approach emphasises transparency, accountability, and impact,

ensuring that every contribution—whether large or small—is utilised to its fullest potential. We continue to refine our strategies to meet the evolving needs of our beneficiaries and to set a gold standard in professional trusteeship.

As we look ahead we hope that the highlights in this years Engaged Philanthropy Review inspire you to join us and help shape a collective future that's better for all New Zealanders. You can make a difference and together, we'll create change.

IN THIS EVOLVING LANDSCAPE, PERPETUAL GUARDIAN REMAINS COMMITTED TO ADVANCING THE PRACTICE OF TRUSTEE SUPPORTED PHILANTHROPY.

PERPETUAL GUARDIAN IS VALUED IN NEW ZEALAND FOR...



SUPPORTING PHILANTHROPY FOR OVER 100 YEARS



PLACING YOUR HEART'S INTENTIONS AT THE CENTRE OF WHAT WE DO



LEADING INNOVATION – HOME OF THE 4 DAY WORK WEEK



STRATEGIC GIVING USING BEST PRACTICE



SOUND THINKING AND CAREFUL PLANNING

OUR YEAR OF GIVING 2024

TOTAL DONATED

\$30.6 MILLION

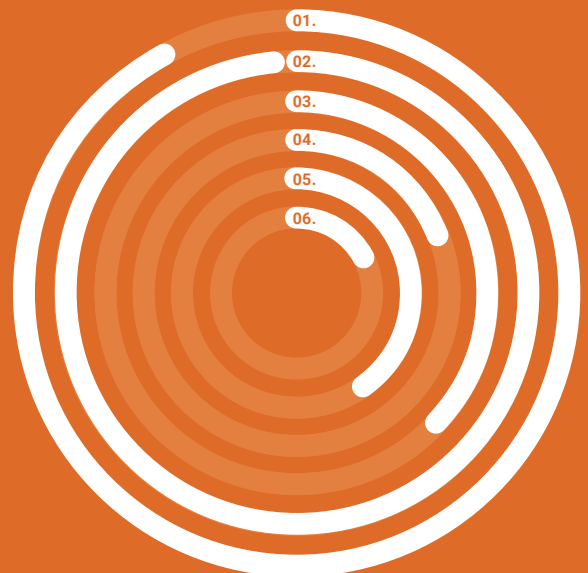


We pride ourselves on

INVESTING IN GOOD / Growth with purpose *established socially responsible investment pathways.

HONOURING INTENT As the custodian of our clients wishes, we work hard to understand and act upon the founding vision.

WE ASSIST OUR DONORS of all sizes to be intentional in their giving, so that their personal philanthropy can have greater impact.



You can make a difference, and together, we'll create change.

AVERAGE
GRANT VALUE

\$16,729

GIVEN

FUNDS
UNDER MANAGEMENT

\$758

MILLION

ASSETS
UNDER MANAGEMENT

\$936

MILLION

PERPETUAL GUARDIAN IS THE LARGEST MANAGER OF PHILANTHROPIC SERVICES IN NEW ZEALAND

OVER **1,950**

GRANTS WERE PAID DURING
THE 2024 FINANCIAL YEAR

OVER **2000**

GRANT APPLICATIONS
ARE MADE ANNUALLY

OVER **600**

CHARITIES/ENTITIES
UNDER MANAGEMENT

1/3

OF TRUSTS ARE DISCRETIONARY
(APPLY FOR GRANTS)

2/3

OF TRUSTS ARE FIXED
(HAVE NAMED BENEFICIARIES)

PERPETUAL GUARDIAN PRIDES ITSELF

on being able to connect donors to the causes they care about anywhere in the country. With 16 branches from Whangarei to Queenstown, our staff walk alongside donors New Zealand-wide.

Snippets of giving

SHIRLEY COOPER of Auckland left a legacy for Medical Research in the Perpetual Guardian Foundation. Gifts from her legacy provided Matai Medical Research Institute to extend their FREE global-standard prostate cancer diagnosis pathway to more men in Tairāwhiti. Otago University to progress a treatment for ultra-rare fatal genetic brain disease called Batten disease and the University of Auckland develop new clinical test to less invasively diagnose endometrial cancer.

FRANK SYDENHAM, a pioneer in horticulture, achieved the feat of attaining a masters in horticulture in New Zealand at a time when this wasn't commonplace. His legacy provides funding with the aim to create a more diverse pool of talented horticulture, forestry, or agriculture scholars. One Te Puke high school graduate funded in 2024 is pursuing her Bachelor of Horticultural Science tracking for first class honours.

The best we can be

ANDREW BARNES

Perpetual Guardian Founder



EACH YEAR AS WE COLLATE AND REVIEW OUR TOPLINE DATA ON CHARITABLE GIVING OVER THE PAST 12 MONTHS, I TAKE SOME TIME TO REFLECT ON THE PEOPLE WHO THOUGHT AHEAD. IN MANY WAYS THESE FOLK HAVE GONE AGAINST HUMAN NATURE: WE ARE BETTER AT REVISITING THE PAST, OFTEN RUEFULLY OR REGRETFULLY, THAN PLANNING ENERGETICALLY FOR THE FUTURE.

But year after year, I find donors and settlors who, during their lifetimes, gazed decades beyond their own lifespans and made concrete plans to help people they would never meet. They thought about education, health care and medical research, the environment and the welfare of other species and our habitats, and our arts and sporting endeavours. And then they gave specific instructions to provide advantages for people who work in and benefit from these fields. I think these quietly generous folk represent much of the best New Zealanders can be.

This year I am remembering Shirley Cooper, an Aucklander who left a legacy for medical research in the Perpetual Guardian Foundation. Shirley's legacy is reaching countless people and putting more power to help in the hands of researchers and clinicians:

- Mātai Medical Research Institute, whose world-leading research to enhance medical imaging capabilities uses advanced software, image-processing, and machine learning, is now able to extend its free global-standard prostate cancer diagnosis pathway to more men in Tairāwhiti.
- Otago University can progress a treatment for the ultra-rare and fatal genetic brain disease known as Batten disease, which typically begins in children aged between five and 10.
- The University of Auckland has received funds to develop a new, less invasive clinical test to diagnose endometrial cancer, the most prevalent gynaecological cancer in New Zealand.

Frank Sydenham's legacy is similarly meaningful in a different arena. A pioneer in horticulture, Frank achieved the feat of attaining a Master's degree in the subject at a time when such accomplishments were not commonplace in New Zealand. The funds and directions he gave have for many years been creating a more diverse pool of talented horticulture, forestry, and agriculture scholars, and latterly a Te Puke high school graduate funded in 2024 is pursuing her Bachelor of Horticultural Science, on track for first-class honours.

There are many dozens of stories of other largely unsung New Zealanders in the Perpetual Guardian Group portfolio, and we share them as often as possible in media and with our clients – both to give credit to these wonderful charitable donors and to illuminate the powerful and often far-reaching effects of their good deeds.

While the philanthropic management machine which sits behind our Group's 600+ charitable entities is these days quite complex in some regards, in our structuring and stewardship of trusts and granting we never lose sight of what all these donors intended – simply to help others. In doing so they are making New Zealand better for all of us.

WE NEVER LOSE SIGHT OF WHAT ALL THESE DONORS INTENDED – SIMPLY TO HELP OTHERS, AND IN DOING SO THEY ARE MAKING NEW ZEALAND BETTER FOR ALL OF US

In New Zealand, generosity is recession-proof

PATRICK GAMBLE

Perpetual Guardian Group CEO



THESE ARE NOT EASY TIMES, BUT THE 2024 PERPETUAL GUARDIAN ENGAGED PHILANTHROPY REVIEW REMAINS A POSITIVE AND INSPIRING READ. APPARENTLY, IT TAKES MORE THAN AN ECONOMIC DOWNTURN TO DAMPEN NEW ZEALANDERS' GENEROSITY: THE TOTAL GIVING STEWARDED BY PERPETUAL GUARDIAN IN THE LAST FINANCIAL YEAR, \$30.6 MILLION, IS A 30.2% INCREASE ON PREVIOUS YEAR'S CHARITABLE FUNDS DISTRIBUTION OF \$23.5 MILLION.

Whilst such fluctuations in our giving portfolio can be attributable to investment markets, a number of new donors began their philanthropic journey during the year. In tracking this remarkable increase, our philanthropy team has observed that some important metrics have shifted upward. The average grant value in the 2023-24 financial year was \$16,729, compared with \$11,705 the year before – an astonishing 42.9% increase. This is partly attributable to an increasing focus on enhanced grant-making mechanisms and granting meaningful sums in support of charities working hard on the front lines of their sector.

There have been increases, several of them significant, in all but one of the key categories traditionally supported by the generous legacies of our clients. Notably, grants benefitting environmental causes totalled \$4.0 million in the past year, compared with \$0.6 million the year before (+566.7%). Education-focused granting rose to \$3.7 million from \$1.5 million the previous year (+146.7%), giving to the arts was up 58.3% to \$1.9 million, and grant support for social services rose to \$9.9 million from \$8.2 million (+20.7%).

The Perpetual Guardian Group has grown in size and reach over the past year. This is partly thanks to the hard work of our team in serving clients and creating opportunities for investors, philanthropic or otherwise, and due to the Private Wealth division of Trustees Executors Limited and Castle Point Funds Management Limited joining the group, the latter operating under the PG Investments umbrella.

The Group's philanthropic assets under management have grown to almost \$1

billion in the last year and funds under management have risen to over \$758 million, meaning Perpetual Guardian Group remains the largest steward of philanthropic funds in New Zealand.

Perpetual Guardian Group has many decades of experience connecting donors to the causes they care about anywhere in the country and sometimes offshore. With 16 branches from Whangarei to Queenstown, our team works alongside donors from all walks of life and with every kind of passion for change, from the universal to the specific, whether New Zealand-based or global.

From discrete charitable trusts and bequests to the everyday philanthropy demonstrated by the Perpetual Guardian Foundation, we have the right vehicle for almost every donor and keep our doors open wide to an array of potential beneficiaries. A lot of philanthropic work is quiet, even humble, with donors preferring to remain anonymous. Others are fundraising and have commenced their giving journey during their lifetime to help shape and capture their heart's intentions now.

We are proud, in this review, to shout from the metaphorical rooftops about the generosity of thousands of New Zealanders, some no longer with us and how it has added up to another significant year of giving – at a time when many fellow Kiwis need it most.

A promise we make to our philanthropy clients is, 'You can make a difference, and together, we'll create change.' Sometimes, when we look around the world and see struggle and strife and unchecked tyranny, it is hard to see where change can happen – it is hard

PERPETUAL GUARDIAN GROUP HAS MANY DECADES OF EXPERIENCE CONNECTING DONORS TO THE CAUSES THEY CARE ABOUT ANYWHERE IN THE COUNTRY AND SOMETIMES OFFSHORE.

to find reasons for optimism. But I hope this year's review can be read as proof of how readily, through their intentions and planning, New Zealanders help others and create opportunities for the generations to come; and as cause for hope.

Thank you for reading, and thank you to our clients, donors, and beneficiaries for your trust in us. We look forward to walking alongside you in the years to come.



ENGAGED PHILANTHROPY
REVIEW 2024

SEED CAPITAL.



FOR AGRICULTURE

FORMING PART OF THE ENVIRONMENTAL PORTFOLIO PHILANTHROPY REMAINS A CRITICAL PARTNER IN FOSTERING THE SUSTAINABLE AGRICULTURAL AND FOOD SYSTEMS OF OUR FUTURE.

Our clients understand that agricultural and food systems are too big and complex for any one entity or individual to change independently. So they have long been funding and creating pathways for scholarships and scientific research designed to protect our environment, enhance productivity, and improve farmer livelihoods.

Whether you wish to build on the rich family and community traditions of connection to the land, history and cultures, or mobilise a new generation of leaders for the well-being of people, animals, and our planet - funding in agriculture and food systems helps contribute to the wider success of our social, economic, educational, and political sectors.

KEY STATISTICS

\$240k

PROUDLY stewarded to the agricultural sector.

DURING the 2024 financial year.



TOTAL
DONATED

Agriculture

\$240k

CASE STUDY

The Kathleen Spragg Agricultural Research Fund

THE KATHLEEN SPRAGG AGRICULTURAL RESEARCH FUND ENABLES WORK THAT WILL DELIVER BENEFITS TO THE PASTORAL INDUSTRY OF NEW ZEALAND. WORKING ALONGSIDE LEADERS IN THE AGRICULTURAL SECTOR FUNDING IS DIRECTED TO PURPOSES RELATING TO TRAVEL AND OPERATIONAL COSTS OF RESEARCH AND/OR DEVELOPMENT IN SOILS, PLANTS AND ANIMALS AND RELATED AREAS TO THE PASTORAL INDUSTRY.



Kathleen Spragg established her Charitable Trust in 2002. She did so in memory of her maternal grandfather Wesley Spragg who was the founder of New Zealand Dairy Association and who travelled widely by horse and buggy to persuade dairy farmers to form a co-operative dairy company. She also wished to honour the memory of her father C R Spragg, a former agricultural student at Lincoln College, soldier, employee of Wallaceville Laboratories, meat inspector and manager of the Gisborne Abattoir. Mr Spragg was also a pedigree Jersey breeder and dairy produce exporter who, like many of his time, was forced to walk off his farm during the depression years.

Kathleen established her Trust during her lifetime in 2002 and walked alongside the appointed Board of Governors, also leaders in the agricultural sector of New Zealand, in the delivery of grants, scholarships and fellowships. Her wishes were then readily emulated after her passing, leaving a powerful legacy to foster general research and development in soils, plants and animals and related areas in New Zealand so that the knowledge gained shall be of benefit to the now multi-faceted pastoral industry throughout New Zealand.

Kathleen's lived experience was that agriculture is a cornerstone of New Zealand's economic life and self-identity

and her legacy is about diving into the deep end of sustainable agricultural processes and creating a framework for better pastoral systems in the future. In almost 22 years of operations Kathleen and thereafter her Board of Governors together with her professional Trustee, Perpetual Guardian has provided grants of almost \$700,000 towards these outcomes.

RESEARCH AND TRAVEL
GRANTS INCLUDED

Funding to facilitate Dr Daniela Lourenco's visit to New Zealand to hold a workshop for key scientists and decision makers working on genetic improvement in our livestock industries. This three day workshop had 30+ in-person attendees from AgResearch, Beef and Lamb NZ Genetics, Massey University, Livestock Improvement Corporation, DairyNZ/NZ Animal Evaluation Limited, University of Otago, Plant and Food Research, Cawthron Institute, Kiwifruit Breeding Centre and AbacusBio, as well as 40+ online attendees from New Zealand, USA, UK, Spain, India, Brazil, Australia and numerous other countries. The topics covered included introduction to genomic selection, the methods in multi-breed and crossbreed, the genetic trends, how to maximise the reliability of evaluation, use

of sequence data, calculation of Single Nucleotide Polymorphism effects, and the comparison of simple and complex models and how to use BLUPF90+ software. Note: The BLUPF90 is a family of programs is a statistical software package used in quantitative genetics for animal and plant breeding. It can fit mixed models using restricted maximum likelihood as well as Gibbs sampling to estimate variance components, and predict breeding values via best linear unbiased prediction.

Another grant supported two targeted 'on farm' studies in conjunction with the Massey University Foundation to measure the changes in phosphorus forms and the release of phosphorus in saturated critical source areas (CSAs). These studies examine the changes to the soil under saturation in actively flowing CSAs, identifying the best mitigation strategies to manage CSA's, and to effectively reduce the loss of phosphorus from farms.

Operational expenses were provided to enable Carmen Teixeira to travel and promote the AgYields database, developed as an open access central repository for pasture and crop yield data. The AgYields database project aims to provide vital data within a central framework that will allow more informed decision making on-farm, and within industry and by councils and the Government. The extensive database will be also a valuable tool to educate students who will become the leaders of the agricultural sector in the future.

KEY THEMES FROM THE TRUSTS FELLOWSHIPS AND GRANTS INCLUDE

- Dryland pasture species
- Animal nutrition
- Pasture agronomy
- Crop agronomy and modelling
- Nitrogen leaching and nitrogen cycling
- Environmental and social sustainability in farming systems
- Animal production science
- Animal genetics and breeding
- Neurophysiology
- Parasitology.

Angus Heslop – Fellowship Student

SECOND TO LAST YEAR

IN 2022 I WAS THRILLED TO LEARN I HAD BEEN AWARDED A KATHLEEN SPRAGG FELLOWSHIP TO SUPPORT MY PHD RESEARCH AT LINCOLN UNIVERSITY, WHICH IS AIMED AT IDENTIFYING OPTIMUM BREEDING METHODS FOR IMPROVING SEASONAL YIELDS AND VEGETATIVE PERSISTENCE FOR RED CLOVER.

I am happy to report that I am on track to complete my PhD in 2025. I have successfully published my first research paper into the Frontiers in Plant Science journal, and have completed data collection, data analysis and planning to submit my draft second and third thesis chapters as peer-reviewed papers. I have also completed the first-year data collection across two field trials for my fourth chapter.

My research looks to expand on existing red clover breeding programmes and improve understanding of key physiological responses in red clover to biotic and abiotic stresses through a mixture of traditional and new experimental breeding techniques. This programme also aims to highlight the genetic resources we are lucky to have in New Zealand through the Margot Forde Germplasm Centre and how these resources can be utilised and incorporated to produce highly productive adaptive pastoral cultivars. The ultimate aim is to support the development of elite cultivars that are better adapted to adverse weather. The current impact to farmers experiencing adverse drought conditions across certain regions in New Zealand highlights the importance of work such as this. Developing cultivars able to withstand such events and as a result build resilience in pastures is crucial to ensure farmers to recover fast after these events.

I'm anticipating that the long-term potential benefit to the pastoral industry is the provision of tools, techniques, and breeding pools that will be potentially used to develop superior adaptive red clover cultivars, and in time will be able to be used across a range of pastoral species. At a personal level I have had the opportunity to expand my skillset and knowledge as a breeder. I would hope this would lead to significant contributions to future pastoral research both in red clover and other pastoral species within New Zealand.

I would like to express my gratitude to Kathleen Spragg for her forward-thinking legacy and to the Board of Governors for their endorsement of my research work and awarding me this research fellowship. I will continue to seize the most of this opportunity.

**ANGUS HESLOP
GRANT RECIPIENT**





ENGAGED PHILANTHROPY
REVIEW 2024

DRAWING A LINE. ♡



FOR EDUCATION

THE LIFE-CHANGING IMPACT OF SCHOLARSHIPS - WHERE EVERY KIWI KID SHOULD HAVE A CHANCE TO SUCCEED.

Our philanthropic clients are passionate about education as a means to transform the lives of a diverse range of students through the provision of affordable and equitable access to learning.

Whether you prefer to endow academic, sporting or leadership success, creativity, service to the community, or all-round good character, scholarships can play a fundamental role in the personal and professional trajectory of a student's life.

KEY STATISTICS

\$3.7

PROUDLY stewarded to the education sector.

DURING the 2024 financial year.



TOTAL
DONATED

Education

\$3.7m

CASE STUDY

Ngā Hoe e Kupe Pathfinder Scholarship

JAMES MACINTOSH WAS AN IMPORTER AND EXPORTER (MERCHANT) BASED IN WELLINGTON NEW ZEALAND IN THE EARLY 1900'S. HIS LAST WILL WAS DATED 19TH JUNE 1919. IN 2024 HIS LEGACY CONTINUES TO SUPPORT STUDENTS PURSUING A TERTIARY EDUCATION IN WELLINGTON.

In 2020 Dianna Revell received the opportunity of a lifetime, being a winner of the Ngā Hoe e Kupe Pathfinder Scholarship sponsored by the legacy of James MacIntosh.

Attending university wasn't on the cards for Dianna Revell. Financial hardship, family obligations, and limited support throughout high school placed obstacle after obstacle in her path to obtaining a degree. The Kupe Scholarship programme was designed specifically to alleviate those barriers so rangatahi from underserved communities could pursue their academic dreams.

In addition to funding full tuition, first-year housing, and course materials, the Scholarship provides a one-week prep programme before the students' first year to ensure a smooth transition into university life. After three years of hard mahi (work), the flagship cohort of Kupe scholars graduated in May 2024 surrounded by supportive whānau and friends.

Dianna's desire now is to use her academic accomplishments to serve the generation coming up behind them.

"I majored in criminology with the hope of helping our young Pasifika and Māori

students," says Kupe scholar Dianna Revell. "I attended a low decile school and I would see quite a lot of violence and crime on a daily basis. Finding a way to contribute to my community to help lower those statistics is a passion project of mine."

DIANNA REVELL
GRANT RECIPIENT



Library Association of New Zealand Aotearoa

IN 2020, THE NEW ZEALAND GOVERNMENT ENTRUSTED THE NATIONAL LIBRARY OF NEW ZEALAND WITH THE RESPONSIBILITY OF LEADING AND SUPPORTING COVID-19 RECOVERY EFFORTS ACROSS THE COUNTRY'S LIBRARY SYSTEM. THIS INITIATIVE LED TO THE CREATION OF THE NEW ZEALAND LIBRARIES PARTNERSHIP PROGRAMME (NZLPP).

In May 2021, the NZLPP allocated funding to the Library Association of New Zealand Aotearoa (LIANZA) and the School Library Association of New Zealand Aotearoa (SLANZA), who collaborated to enhance qualifications within the library and information sector. This funding aims to support the retention of librarians and library services in New Zealand, ultimately assisting communities in their recovery.

That same year, the Partnership appointed Perpetual Guardian as the agent responsible for the effective stewardship and implementation of the grant offerings. Over the course of this three-year program, the

partnership has awarded grants to over 130 students, aspiring librarians, and current librarians seeking to upskill across New Zealand.

The scholarship program was designed to eliminate barriers to entry by providing funding that extends beyond just tertiary fees, ensuring inclusivity for those passionate about pursuing careers in library and information services. The program's flexibility allowed students to maintain full-time employment if necessary. Many recipients were single parents or had households filled with family and other competing priorities. Despite these challenges, they navigated

significant mental health journeys and achieved remarkably high course results.

Many students reported a reduction in stress due to the financial support they received while pursuing their studies. Notably, over one-third of the grant recipients reported receiving promotions as a direct result of their educational advancements. While some faced challenges that prevented them from continuing their studies, all expressed a newfound passion for this often-overlooked sector, now enriched with new candidates eager to embark on careers in library and information services.

McGillvray Brothers Fund.

JOHN MCGREGOR MCGILLVRAY, BORN IN THE LATE 1800S TO ANN MCGREGOR OF BANFFSHIRE, SCOTLAND, AND ANGUS DUNCAN MCGILLVRAY OF STRACHAN, KINCARDINESHIRE, SCOTLAND, WAS ONE OF SEVEN SIBLINGS. HIS LEGACY OF PHILANTHROPY BEGAN IN 1960, THE SAME YEAR OF HIS PASSING, WITH THE ESTABLISHMENT OF THE MCGILLVRAY BROTHERS FUND.

The Fund was created with the intention of supporting the University of Otago and advancing medical research. Over the past 60 years, under the stewardship of the Dean of the Medical Faculty and the Vice-Chancellor of the University of Otago, it has enabled students to undertake summer research internships in partnership with Otago Medical Research Foundation.

Each year, the Otago Medical Research Foundation funds around 20 summer research projects related to human health, including biomedical sciences and public health. The McGillvray Brothers Fund contributes by providing at least one scholarship annually.

Applications for the scholarships are meticulously assessed by the Foundation's Scientific Committee, ensuring that only the most promising projects receive funding from the McGillvray Brothers Fund.

The student summer research projects, supervised by senior researchers, run for 10 weeks and frequently pave the way for careers in research and teaching. These projects also contribute valuable

knowledge across various fields.

During the 2023-2024 summer, the McGillvray Brothers Fund supported Leesuk Isaac Kim's project titled "The Evolution of a Synthetic Nanobody to Block Migraine Signalling." This research was supervised by Associate Professor Peter Mace from the Department of Biochemistry, BMS. In Leesuk's words:

Migraine is a form of severe headache that is caused by neurogenic inflammation, affecting approximately 642,000 individuals in New Zealand according to Migraine Foundation Aotearoa New Zealand. Migraine pathophysiology involves various neuropeptides, with calcitonin gene-related peptide (CGRP) playing a key role. CGRP is a potent vasodilator and has been implicated in the development of migraine attacks.

CGRP exerts its effects by binding to its receptors, which are comprised of a calcitonin receptor-like receptor (CLR) and a receptor activity-modifying protein (RAMP), typically RAMP1. This CLR-RAMP1 complex enhances CGRP

signaling, contributing to the vasodilation and neurogenic inflammation associated with migraines.

The interaction between CGRP and its receptor is a critical target for migraine therapies. Monoclonal antibodies and small molecule antagonists that block CGRP or its receptor have been developed and are used to prevent migraine attacks.

In 2018, FDA-approved monoclonal antibody drug, Erenumab was shown to have therapeutic effect on migraine by preventing CGRP from binding CLR-RAMP1.

Our project focussed to characterise the nanobody version of Erenumab through sophisticated techniques such as cloning, protein purification, and flow cytometry.

We were able to purify and fluorescently label CLR-RAMP1 protein and purify the Erenumab-like nanobody that was later on transformed into the AHEAD system. Through AHEAD system, we have tested the affinity between the nanobody and the CLR-RAMP1 protein, which resulted in 'no result' due to unsuccessful transformation of nanobody plasmid into the yeast.



ENGAGED PHILANTHROPY
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SEEING CLEARLY.



INTO HEALTH

IN A WORLD WHERE HEALTH DISPARITIES ARE INCREASINGLY PRONOUNCED, PHILANTHROPIC FUNDING REMAINS A PIVOTAL FORCE IN ADVANCING HEALTH CARE DEVELOPMENT IN NEW ZEALAND.

Donors who contribute to health-related causes come from diverse backgrounds, each bringing unique motivations and characteristics to their philanthropy. They might be survivors or patients, family members or caregivers and their philanthropic contributions are widely recognised for their role in health care development, be that the creation of culturally responsive health services, improved access, health education and in some cases even advocacy and policy initiatives.

KEY STATISTICS

\$9.2

PROUDLY stewarded to the health sector.

DURING the 2024 financial year.



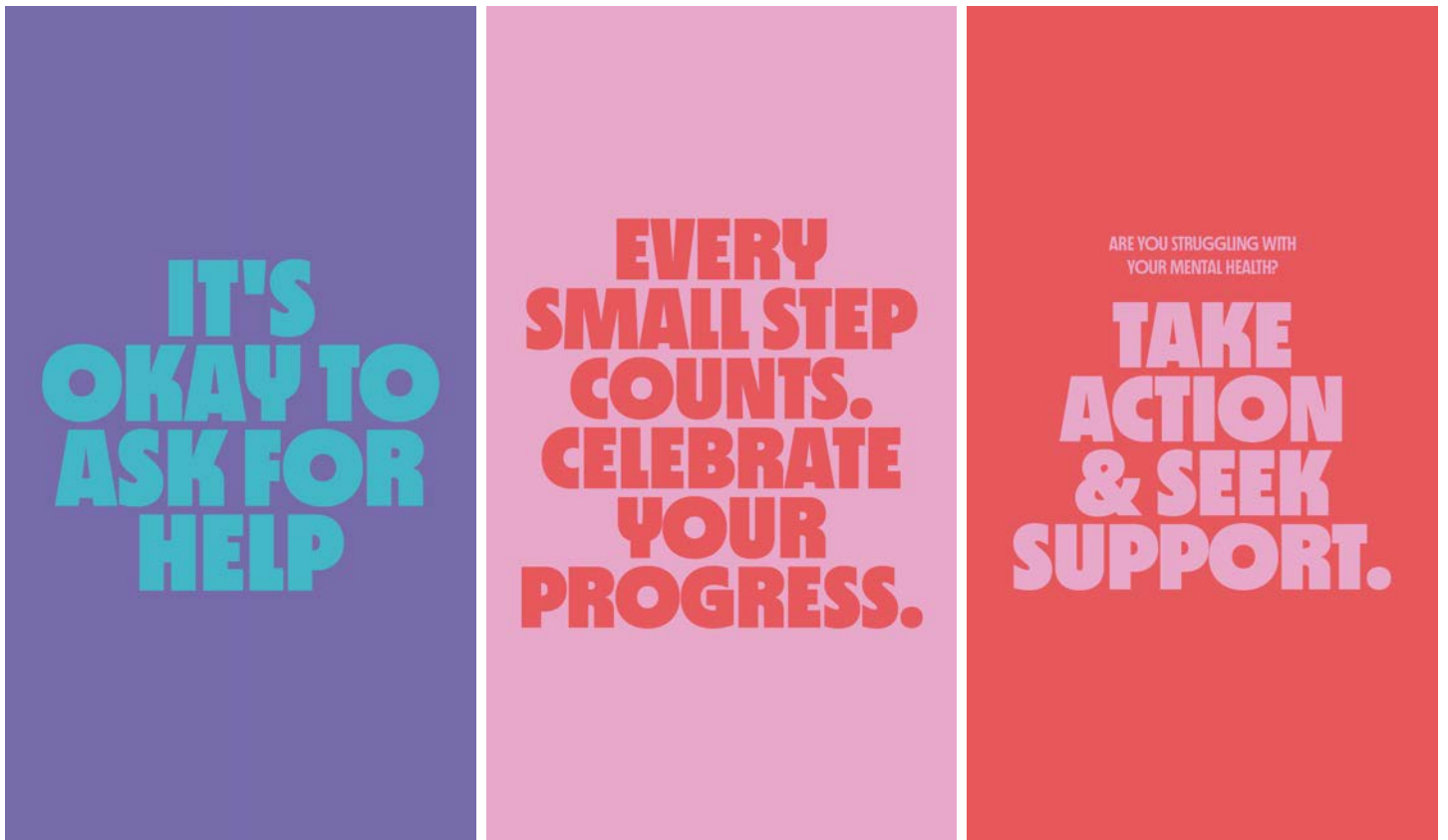
TOTAL
DONATED

Health

\$9.2m

CASE STUDIES

Enhancing Mental Health Services



VOICES OF HOPE CAMPAIGN GRAPHICS

Addressing the mental health crisis in New Zealand requires substantial resources and more importantly innovative solutions. Philanthropic contributions help fund programs and services that provide crucial support for mental health services, including counselling, community outreach, and awareness campaigns. These efforts are vital in improving access to mental health care across the board.

Perpetual Guardian Staff pledged their support for Life Matters and Voices of Hope as a part of the organisation's Christmas giving campaign in December 2023. Organisations are very much at the coal face of New Zealand mental health crisis. Life Matters has been working steadfastly since 2014 to reduce the incidence of suicide by promoting preventative strategies and supporting

families devastated by loss. Voices of Hope uses the power of storytelling and sharing lived experiences to create positive change and to bring better understanding of mental health challenges, promote help-seeking behaviours and provide useful resources, and ultimately spread hope.

Advancing Medical Research & Innovation

Philanthropic funding plays a crucial role in advancing medical research. Many donors support research initiatives that focus on understanding and treating diseases, including cancer and rare conditions. These funds can help accelerate the development of new treatments, improve diagnostic tools, and enhance patient care.

The legacies of Sir Ernest Hyam Davis and Ted & Mollie Carr in partnership with the Auckland Medical Research Foundation supported research into neurodegenerative diseases of the eye, brain and inflammasome biology to investigate whether there is a combination of drugs that will create a more effective therapeutic approach to treating and halting the progression of Alzheimer's disease. Work very much in line with the legacies' support of elderly and the prediction that dementia is expected to double in the next 20 years, affecting approximately 10% of people aged 65+, which by 2050 there will be almost 170,000 New Zealanders.

Supporting Disability and Accessibility Services

For the one in four New Zealanders with disabilities or unique access needs, philanthropic funding can make a significant difference. Donations help support services and programs that enhance quality of life, including accessible infrastructure, specialised medical care, and community integration initiatives.

The Wheelchair Charitable Trust under the umbrella of the Perpetual Guardian Foundation provided a shower commode and hoist for a young person which requires support in all aspects of everyday life, a beach wheelchair for IDEA Services in the far north of New Zealand to ensure low income wheelchair users can also access New Zealand's beautiful waterways, and funding for three social entrepreneurs seeking to apply possibility leadership, design and innovation with the aim of creating a future that is truly accessible for all.

Addressing Health Disparities

Philanthropic funding is essential in tackling health disparities. Contributions can target underserved communities, providing resources for health education, preventive care, and access to essential services. This targeted support helps bridge gaps in health care and ensures that vulnerable populations receive the care they need.

Building on more than 40 years in service The Stroke Foundation, supported by the Guy Anson Waddel Charitable Trust supported the Southland Community Advisor in the delivery of free support to stroke survivors and their whānau as well as providing education to the wider community about stroke prevention and stroke awareness. A critical service for people to make a successful transition from hospital to managing their own recovery and wellbeing at home, while reintegrating into their community.

Supported by the legacy of Shirley Cooper via the Medical Research Fund in the Perpetual Guardian Foundation the Matai Medical Research Institute will progress their Accuracy & Equity in Prostate Cancer Diagnosis research program which is already indicating significant progress towards minimising unnecessary medical procedures and enhancing patient outcomes in the Tairāwhiti – Gisborne region. The funding will support the direct prostate cancer scan costs for the project, for an additional 100 men, over the following year. The data from the 3-year project will be used to propose a nationwide rollout of the new diagnostic pathway in the public health system.



10X10 EVENT SUPPORTING DISABILITY & ACCESSIBILITY

TOTAL
DONATED

Social Services

\$10m

Helping New Zealanders thrive – promoting fairness and equity in all aspects of New Zealand society.



WITH JUST OVER 50% OF ALL FUNDS STEWARDED ANNUALLY GOING TO SOCIAL SERVICES, IT IS PLAIN TO SEE THAT OUR CLIENTS FEEL STRONGLY ABOUT SOCIAL SUPPORT AND SOCIAL JUSTICE AS FACILITATORS OF POSITIVE SOCIETAL AND SOCIAL CHANGE.

At its best the social services sector aims to get to the root of the toughest problems in an ever challenging political and socio-economic environment. With Perpetual Guardian's stewardship, our donors fund work at both the grassroots level and through systematic reform to create a level playing field.

WELLBEING AND COMMUNITY

There are multiple strands to New Zealand's social services network, the breadth and depth of which is difficult to comprehend, because at the heart of the issue are real people and families facing challenges that affect all aspects of their lives.

With the hearts intentions of our clients at the helm, Perpetual Guardian supports the stewardship of funds that leverage the experience of people who work with those who are most in need, at the coal face alongside of effective interventions.

Perpetual Guardian supported the stewardship of \$9.9M to the social services sector in FY24. Funds derived from our social services donor community are typically gifted in one of three ways:

- Reactive – Keeping good things going by responding to a suite of applications and selecting the most compelling proposal/s.
- Compensatory – Wishing to make good any deficiencies, especially where there has been little funding in the past.
- Interventionist – Wishing to have a significant impact on a particular issue or area.

Using these channels and a continuous ethos of measure and evaluate, our clients legacies are significantly funding this sector in order to improve the lives of New Zealanders.

CASE STUDIES

Sir Ernest Hyam Davis

Sir Ernest Hyam Davis was a business man, the founder of New Zealand breweries, and former mayor of Auckland. He was born on 17 February 1872 in Nelson to merchant and brewer Moss Davis and Leah Davis (née Jacobs). Ernest attended Bishop's School in Nelson, and later Auckland Grammar after his father joined, then acquired the Auckland liquor firm of Hancock and Company.

In 1892 Davis joined his father's firm as a director along with his brother Eliot, and three years later added the directorship of another family acquisition, the Captain Cook Brewery, then the largest in New Zealand.

When Moss Davis retired in 1910 to England, the two brothers took charge of Hancock and Company.

With his portfolio of controlling shares, Ernest was appointed managing director, a position he retained until his passing in 1962.

On 2 August 1899, in Auckland, Ernest married Marion Mitchell. She was a child

opera star, beginning her career in a juvenile opera company at the age of 14. As a wife and mother, she actively participated in a large number of civic and charitable organisations, and became Lady Davis in 1937 when her husband, was knighted, "Sir Ernest." They had two children, a son, Desmond and a daughter, Mollie.

Sir Ernest was a man with many varied interests, from being a successful and eminent businessman to sailing, horse racing, sports, arts and social welfare; he enjoyed life to the fullest.

Later in life he distributed much of his then immense wealth to philanthropy. His biography 'A Man of the People' captured his vast success, not only as a successful mayor and businessman, but also as a philanthropist and humanitarian who revolutionised the charity sector.

During his life time (amongst other things) Ernest gifted Motukorea (Browns Island) to the citizens of Auckland, established the superb medical library at Auckland Hospital

in honour of his wife (who had died in May 1955), and funded the construction of the Tiritiri Matangi Island shipping light.

He died on 16 September 1962 at his central city residence in Waterloo Quadrant, survived by his daughter Yvonne Aileen Leah Carr (Mollie).

Yvonne Aileen Leah Carr (Mollie) went on to follow in her mother and father's footsteps eventually a successful and wealthy property investor in her own right. She married Ted Carr in 1947 and moved to Sir Ernest's Highfields property in Rotorua.

Like her mother and father, Mollie's generosity came through in all aspects of her life, and her legacy, alongside of her fathers, continues to benefit New Zealanders to this day via their shared giving ethos that benefits the relief of poverty and destitution, and care of homeless, sick and indigent persons (with particular regard to the care of the aged.



**SIR ERNEST AND
LADY MARION DAVIS**

TOTAL DONATIONS
TO CHARITY

Givealittle

\$8m+



GIVEALITTLE HAS BECOME MORE THAN A WEBSITE TO FACILITATE FUNDRAISING – IT IS AN EVOLVING AND INCREDIBLE DONOR PLATFORM EXPERIENCE THAT PEOPLE, SCHOOLS AND CHARITIES TRUST TO SUPPORT AND ELEVATE DIGITAL FUNDRAISING CAMPAIGNS, SHARE A PASSION FOR A CAUSE THEY LOVE AND SUSTAIN THE ADVANCEMENT OF THE CHARITABLE SECTOR IN NEW ZEALAND AS A WHOLE.

We know that crowdfunding has revolutionised the way individuals and organisations raise funds. For charities working at the coal face, this innovative approach offers a dynamic platform to connect with supporters, amplify their reach, and secure much-needed additional resources to keep good things going for those in need. As traditional fundraising methods stretch, linking into crowdfunding platforms can empower charities and tap into a vast network of potential donors beyond their usual reach. This includes crowd-fundraising pathways for the charitable trusts supported by Perpetual Guardian as a professional trustee. Some have partnered with Givealittle crowd-fundraising pages and campaigns to elevate their social impact and raise additional funds for the charitable purposes they have a great deal of passion for.

THE BEAUTY OF GIVEALITTLE IS ITS VERSATILITY TO BE USED AS A PEER TO PEER FUNDRAISING PLATFORM FOR AN URGENT NEED FOR EVERYTHING FROM UNFUNDED MEDICAL TREATMENT TO ASSISTANCE FROM A NATURAL DISASTER; BUT ALSO FOR SCHOOL AND CHARITABLE GIVING CAMPAIGNS.

GIVEALITTLE IN ACTION

Case Studies



EPILEPSY FOUNDATION OF NEW ZEALAND

With the support of Givealittle and the Perpetual Guardian Foundation the Epilepsy Foundation of NZ supports people, programmes, research and technological advances that aim to improve the lives of people living with epilepsy and their families by providing biennial grants to organisations who closely support the one in fifty New Zealanders living with epilepsy whether that is helping to improve quality of life, the provision of therapy sessions, counselling, research, or other health and social services related outcomes.



TAYLA MADE FOUNDATION

Launched in 2020 in partnership with the Perpetual Guardian Foundation, the Tayla Made Foundation was created by Aimes Award-winning soprano Tayla Alexander.



Tayla understands first hand how difficult the road is for young artists before they get to the professional stage. The charities Givealittle page and Foundation provides charity's a well-managed channel to provide direct funding to young artists and musicians, with transparency as to how their contributions are being used.

“Other established foundations support the arts, but classical music has historically not had the consistent funding support it needs, and this is a grassroots effort to establish a foundation – literally and figuratively – to back young talent for decades to come.”

NEW ZEALAND ANIMAL COMPANION TRUST

An organisation committed to raising funds and urban animal management in partnership with SPCA New Zealand, Perpetual Guardian, Dogs New Zealand, New Zealand Veterinary Association, New Zealand Cat Fancy and many others. Driving neutering & microchipping campaigns; projects that provide care and protection to companion animals - like supporting health care & vaccination programmes for disadvantaged communities; and projects that directly improve companion animal welfare and urban animal management - such as research into how we do things better for our companion animals in all shapes and forms.



\$33.1m
GENEROSITY FOR YEAR END JUNE 2023



11100+
PAGES CREATED



\$23.6m
RAISED BY INDIVIDUALS



2300
PAGES CREATED FOR A CHARITY



3700+
CHARITIES REGISTERED



460+
SCHOOLS ON GIVEALITTLE



391,000
DONATIONS MADE



\$8.1m
DONATED TO CHARITIES

Perpetual Guardian Foundation

TOTAL DONATED
\$1.15m



THROUGH THE FOUNDATION, WE AIM TO BUILD A COMMUNITY OF DONORS WHO COLLECTIVELY ARE ENABLED TO ENGAGE IN MEANINGFUL, IMPACT-FOCUSED PHILANTHROPY. THIS PROVIDES AN OPPORTUNITY FOR OUR DONORS TO MAKE A BIGGER DIFFERENCE TO SOME OF THE MOST CRITICAL CHALLENGES FACING OUR COMMUNITIES THAN THEY MIGHT NOT OTHERWISE HAVE BEEN ABLE TO ACHIEVE THROUGH THEIR GIVING.

The Perpetual Guardian Foundation was established in late 2014 to make venture philanthropy and other contemporary models of effective giving accessible to more New Zealanders. The innovative structure creates a single access point for everyday philanthropists to engage with a range of giving options. Now supporting over 110 individual legacy, endowment, and partnership funds, the foundation is proud to steward funds under management valued at over \$23.4M.

The Foundation's giving practices are impact focussed as guided by the hearts intentions of our clients and donors, so when contributing through the Foundation you can be sure your investment will have a measurable impact in New Zealand.

YOU CAN MAKE A DIFFERENCE AND TOGETHER WE'LL CREATE CHANGE.

CASE STUDY

Support for new mums



NAPPKIN, A SUB-FUND IN THE PERPETUAL GUARDIAN FOUNDATION WAS FOUNDED IN 2018 BY HANNAH NORTON, WHO WAS ONLY TWO WHEN SHE LOST HER MOTHER ANDREA TO SUICIDE. NAPPKIN SUPPORTS NEW MUMS STRUGGLING WITH POST-NATAL DEPRESSION AND PROVIDES MUCH NEEDED SUPPORT FOR THEIR PARTNER TOO.

Hannah is a mum of two, part-time lawyer and writer, who has always aspired to make a difference and honour her mother. Creating the Nappkin Fund in the Perpetual Guardian Foundation gave her intention the infrastructure it needed to become real.

Nappkin initially started fundraising, hosting events and connecting elderly people and new mums to alleviate loneliness.

Today Nappkin remains a small but mighty one-person-run operation with an outsized impact having already supported close to 20 mums through its nanny-support focus on maternal mental wellness.

As one Nappkin client, says, "I didn't know how badly I needed it. It was one night, but in that moment, it felt life-changing. Invigorating. The maternity nanny also

stayed in text contact for a few weeks after. The support kept me afloat."

Perpetual Guardian Foundation's health and wellbeing funds span multiple sectors, contributing to raising the collective quality of life and wellbeing for all Kiwis. Hannah's work is one of many supporting mental well-being, particularly of new mothers, which continues to be of extraordinary importance to the well-being of New Zealand as a whole.

The Perpetual Guardian Foundation is now in its 10th year, with just over 110 sub-funds under management, \$1.15 million in donations in the last calendar year, and a \$30 million pipeline of bequests. Perpetual Guardian understands that causes and funds such as this need experienced and responsible stewardship to be able to help more and more people each year. Our goal

is to connect people so Nappkin and other aspiring Perpetual Guardian Foundation donors, fundraisers and everyday philanthropists can reach more people in need, and in Nappkins case more mums and babies.

Hannah tells us that the feedback she often gets from mums is, 'It was a total gamechanger for me'. So she continues to work to raising funds to help more New Zealand parents in need. All donor funds go directly from the Nappkin Fund in the Perpetual Guardian Foundation to providing maternity nanny services and Hannah only sees the need for support growing, and growing rapidly. This year her goal is to help another 20 women at least through her fund in the Perpetual Guardian Foundation and alongside of our sister organisation Givealittle.



HANNAH (LEFT) AND
NAPPKIN'S PATRON
SINEAD CORCORAN DYE



PHOTO CREDIT LJS STUDIOS

Investing to grow the philanthropy pot

TIM CHESTERFIELD

Chief Investment Officer

MARKETS NEVER SIT STILL AND IT HAS BEEN AN EXCITING YEAR. WE HAVE SEEN A GREAT DEAL OF POSITIVE CHANGE FROM BOTH A BUSINESS AND INVESTMENT PERSPECTIVE AND WE BELIEVE WE ARE BETTER POSITIONED THAN EVER TO HELP CLIENTS NAVIGATE A CURRENTLY TURBULENT WORLD.

Earlier this year, Perpetual Guardian Group bought two aligned businesses in Trustees Executors Wealth and Castle Point, and with those acquisitions we have been busy welcoming new talent, clients and philanthropic funds. But we haven't stopped there. We have rounded out our new capabilities through extensively reviewing our investment offering to ensure we provide a full suite of robust and flexible investment options to our clients, key stakeholders and those who want to secure their philanthropic legacy in the short or long term.

We have launched three new funds in the process: a global alternatives fund powered by BlackRock that offers investors uncorrelated global investment exposure with daily liquidity to help diversify portfolio risk; an Income Opportunities Fund; and our Strategic Growth Fund. These compliment the Australasian High Conviction Fund, a strategy we have been running for eight years.

Last year we talked about our adoption, in Australasian-facing investments, of a differentiated transitional climate aware strategy, which we know is important to many of our philanthropic clients and partners. This excludes certain investments but it does not necessarily penalise those legacy businesses that are changing for the better through their own ESG and climate initiatives. Whether through the disposal of assets; prioritisation of capital investment into new, more considered business; better governance; or social initiatives, legacy can become the contemporary opportunity. Responsible stewardship is not just about casting opportunity aside because of legacy, it is also being there to help shape the way forward.

Perpetual Guardian Group now has \$2.6 billion in funds under management and \$8 billion in assets under management, and as our CEO Patrick Gamble notes in his comments over the past year, philanthropy funds and assets under

management have both seen double-digit growth in the 12 months to June 2024.

PG Investments is a dedicated team that provides easy to use, innovative investment strategies through the dual approach of dynamic, high conviction investments for more focused growth opportunities and index investments for foundational stability. This has clear and demonstrable benefits for our clients. It has been a dynamic year in the markets, but by being focussed, consistent and methodical in our investment delivery we have navigated recent investment volatility and positioned portfolios for the times ahead to great effect. Our stability and strength in investment management and wealth creation has benefitted both clients and the philanthropy sector at large.

Whether our investment solutions are used together or as single components (the 'building blocks') of an investment strategy, our funds aim to deliver



on investors' goals in a controlled environment.

As we evolve at pace to ensure all of our offerings encompass the philosophy behind philanthropy and the new transitional strategy, we continue to provide the dedicated investment approach clients expect, while still recognising that science and technology will evolve over time. Simply omitting particular investments because of their industry may penalise companies that are at the forefront of change and evolution.

We believe that communication is key and clients should understand our thinking. We have a special point of difference in that we stay in closer touch with our clients than most investment managers do. We give clients plenty of insight into what is going on in the market and their portfolio, why we are making the calls we are making, and what the value is to them. This is particularly appreciated by clients

that have a strong philanthropic ethos and whose funds are often widely distributed to enable a variety of good and important works in New Zealand's charitable sector.

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**WE BELIEVE THAT
COMMUNICATION IS
KEY AND CLIENTS
SHOULD UNDERSTAND
OUR THINKING.**

—

As investment managers we can sometimes get wrapped up in the market narrative, the economy, interest rates cycles, geopolitics, domestic policy risk, and other factors that have influence over the investment we provide. But we also have a unique opportunity to lift

our head above the parapet, to engage and see the difference they make to philanthropic endeavours, charities, and individuals alike.

Whether it is to help those in need, to provide a boost to the next generation and their education, or to protect the legacy of generosity, the work is rewarding – and we appreciate you taking this moment with us to quiet the noise and look over the top to see how, together, we are bringing change for the better.

Perpetual Guardian - Who are we?

FOR 100 YEARS PERPETUAL GUARDIAN HAS WALKED ALONGSIDE PHILANTHROPISTS AS NEW ZEALAND'S PRE-EMINENT PROVIDER OF PHILANTHROPIC TRUSTEE SERVICES. THIS HAS GIVEN US A LONG HISTORY OF STRUCTURING AND HONOURING CLIENTS' PHILANTHROPIC INTENTIONS, DURING AND AFTER THEIR LIFETIMES.

Perpetual Guardian is the market leader in personal trust services, managing or supervising group assets in excess of NZ \$2b. Perpetual Guardian has more than 135 years of trust and fiduciary heritage.

We take immense pride in our provision of trust and fiduciary services and use our many years of experience to help you create the legal and administrative structures you need to optimise and secure your legacy. In doing so we have cultivated an unrivalled presence in the charitable sector to ensure effective governance of trusts, management of investment strategy, and smooth, transparent transfers of grants and distributions to charitable causes.

We continue to evolve and test our grant-making boundaries, always with our clients' hearts' intentions at the centre. We are dedicated to making transformational grant-making a part of our journey and we are working hard to fund systemic change and capacity-building initiatives by challenging the status quo and practising different styles of philanthropy. We hope this inspires you to join us and shape a collective future that is better for all New Zealanders.

"WE CONTINUE TO EVOLVE AND TEST OUR GRANT-MAKING BOUNDARIES, ALWAYS WITH OUR CLIENTS' HEARTS INTENTIONS AT THE CENTRE."

Philanthropy

IN ITS EARLIEST FORM, THE WORD PHILANTHROPY (FROM THE GREEK 'PHILANTHROPIA') SIMPLY MEANT LOVE OF MANKIND. THROUGHOUT THE CENTURIES THIS EVOLVED, YET HUMAN CIVILISATION HAS ALWAYS DEPENDED ON KINDNESS DIRECTED TOWARDS STRANGERS.

Charity focuses on reducing the immediate suffering caused by social problems, while philanthropy aims to eliminate the problems altogether.

Today we define philanthropy as the practice of organised and systemic giving to improve the quality of human life. Giving is not new. But the idea of using well structured private funds imaginatively, constructively, and systematically to attack fundamental societal challenges but in a sustainable way, very much is.

Philanthropy = the practice of organised and systemic giving to improve the quality of human life.

Our donors are **DIVERSE**- individuals, companies, families. Together they form a unique philanthropic **community**.

Our team takes care of **EVERYTHING** paperwork, due diligence, compliance.

Our donors can grant income or capital and have the option to invest **TOGETHER** to form a large investment pool.

Our team provides **BEST PRACTICE** grant-making services and works with donors to develop grant-making strategies.

OUR CONTACT DETAILS

Whangarei	110 Bank Street, Whangarei 0110	E - whangarei@pgtrust.co.nz
Takapuna	495 Lake Road, Auckland 0622	E - takapuna@pgtrust.co.nz
Tāmaki-makau-rau / Auckland (CBD)	Level 23, 191 Queen Street, Auckland 1010	E - auckland@pgtrust.co.nz
Remuera	343 Remuera Road, Auckland 1050	E - remuera@pgtrust.co.nz
Tauranga-moana / Tauranga	61 Willow Street, Tauranga 3110	E - tauranga@pgtrust.co.nz
Kirikiri-roa / Hamilton	65 Bryce Street, Hamilton 3204	E - hamilton@pgtrust.co.nz
Rotorua	1130 Pukaki Street, Rotorua 3010	E - rotorua@pgtrust.co.nz
Ahuriri / Napier	136 Hastings Street, Napier 4110	E - napier@pgtrust.co.nz
Te Papaioea / Palmerston North	L1, 209 Broadway Ave, Palmerston North 4410	E - palmerstonnorth@pgtrust.co.nz
Ngāmotu / New Plymouth	20-22 Currie Street, New Plymouth 4310	E - newplymouth@pgtrust.co.nz
Te Whanganui-a-Tara / Wellington	Level 2, 99 Customhouse Quay, Wellington 6011	E - wellington@pgtrust.co.nz
Whakatū / Nelson	15 Buxton Square, Nelson 7010	E - nelson@pgtrust.co.nz
Ōtautahi / Christchurch	329 Durham Street North, Christchurch 8013	E - christchurch@pgtrust.co.nz
Tāhuna / Queenstown	26 Hawthorne Drive, Frankton 9349	E - queenstown@pgtrust.co.nz
Te Tihi-o-Maru / Timaru	2 Sefton Street East, Timaru 7910	E - timaru@pgtrust.co.nz
Ōtepoti / Dunedin	83A Princes Street, Dunedin 9016	E - dunedin@pgtrust.co.nz



perpetualguardian.co.nz
0800 737 738