



Perpetual Native Title and Community Trust

COMMUNITY INVESTMENT MADE EASY

DOES YOUR COMMUNITY NEED A COST EFFECTIVE WAY TO MANAGE AND INVEST ITS MONEY?

Managing your community's funds doesn't have to be complicated or costly. At Perpetual, we have a cost effective way for you to invest in your community's future, with the benefits of professional management. It's called the Perpetual Native Title and Community Trust (the Trust).

WHAT IS THE PERPETUAL NATIVE TITLE AND COMMUNITY TRUST?

The Trust is a pre-established charitable trust registered with the Australian Charities and Not-for-Profits Commission, with Perpetual as trustee. It is designed to provide Aboriginal communities with a way to invest their money for immediate and future needs. When communities set up an account within the Trust, Perpetual provides services to help manage, protect, grow and distribute their funds.

WHO IS IT SUITABLE FOR?

An account within the Trust is generally suited to communities with a strong Approved Recipient who can:

- engage with the community
- deliver programs for charitable purposes
- prepare budgets
- distribute funds in line with what has been agreed by the community

WHY PERPETUAL?

The communities we work with generally tell us they choose Perpetual for three reasons:

- We have a dedicated team who are experienced in working closely with Aboriginal communities. We take the time to listen, to understand and to support them with their immediate needs and future vision.
- We are one of Australia's largest, oldest and most experienced trustees. We have the right expertise to help achieve what's important for communities.
- We have a proven track record of protecting and growing investments over the long term.

WHY CHOOSE THE PERPETUAL NATIVE TITLE AND COMMUNITY TRUST?



COMMUNITY-LED

Your community nominates and endorses a corporation to represent the community (Approved Recipient). The Approved Recipient recommends what your community's money is used for and is responsible for passing funds on to the community to address their greatest needs.



COST EFFECTIVE

Because the Trust is pre-established, **there are no establishment fees**, so opening an account costs less than setting up your own trust. As there is a pre-agreed list of services, the ongoing fees are understood beforehand with no surprise additional fees. You can request further services which are charged at an hourly rate.



SIMPLE TO SET UP

Perpetual can guide you through the relatively simple process of completing an establishment form and providing an initial investment to set up your account



WE TAKE CARE OF THE ADMINISTRATION

Perpetual is ultimately responsible for the Trust and takes care of trust administration, compliance, auditing, tax, financial and regulatory reporting associated with your account.



SET YOUR COMMUNITY UP FOR THE FUTURE

Often communities choose to use their money to support important needs such as community services, preservation of culture, health and wellbeing and education. Many also choose to invest in planning for future needs and initiatives that help the self-sufficiency of the community and its people. Your account can be set up to last for years, decades or centuries.

WORKING TOGETHER FOR YOUR COMMUNITY

PLAN



We sit down together to understand your community's immediate needs and long term goals.

INVEST



Your community's money is invested by our experienced team to protect and grow it for the future.

MANAGE



Perpetual is responsible and accountable for the ongoing, complex and time consuming duties of a trustee.

DISTRIBUTE



Your community nominates an Approved Recipient to distribute funds to the community's greatest needs.

To see examples of how we work together with communities visit www.perpetual.com.au/nativetitle

MORE INFORMATION

To find out more about how we can work with you to help achieve what's important to your community, or to request a Perpetual Native Title and Community Trust Establishment Form please contact us.

John Hender

National Manager Native Title Trusts and Investments
Perpetual Private
Office 08 8418 5676 Mobile 0413 451 839
Email john.hender@perpetual.com.au

Glen Mesch

State Manager, Western Australia
Perpetual Private
Office 08 9224 4400
Email glen.mesch@perpetual.com.au

www.perpetual.com.au/nativetitle

USEFUL DEFINITIONS

Trust: A trust is a structure which holds property and investments on behalf of another person(s) or organisation for their benefit. It protects the money so that the people can continue to benefit now and for generations to come.

Trustee: A trustee is the person(s) or company that has legal ownership of the trust property and investments, and they can only use the property and investments for the benefit of those identified in the trust deed, typically the Native Title holder.

Account: An account is a sub fund within the Perpetual Native Title and Community Trust that is specific to your community.

Perpetual Private trustee services are provided by Perpetual Trustee Company Limited (PTCo), ABN 42 000 001 007, AFSL 236643. This publication has been prepared by PTCo in January 2016. This is general information only and is not intended to provide you with advice or take into account your objectives, financial situation or needs. To the extent permitted by law, no liability is accepted for any loss or damage as a result of any reliance on this information. Any reference to the Perpetual Group means Perpetual Limited and its subsidiaries