



PARTNER WITH US TO  
SUPPORT THE COMMUNITY

Help us multiply  
the **power**  
of good intentions

# Introducing the Morgans Foundation – getting behind the community.

Mark Gross – our regular volunteer surfer for the Wipe Out Dementia fundraising event for the Centre for Healthy Brain Ageing.



The Morgans Foundation works with local Morgans branches to support their communities and raise funds for charities that are changing Australian lives.

### About us

Since 2005, we have donated over \$10 million to more than 150 charities.

In 2011, the Foundation was named Queensland Community Philanthropist of the Year.

### The charities we support

As well as branch-nominated local charities, we commit to these charities on an ongoing basis so they can maintain programs and plan new ones:

- Arthritis Queensland
- Australian Cancer Research Foundation
- CheBA (UNSW)
- Children's Tumour Foundation
- Foodbank
- Great Barrier Reef Foundation
- Karuna Hospice
- Lord Somers Camp & Powerhouse
- MAD Foundation
- Micah Projects
- MS Queensland
- Opportunity International
- Parkinson's Australia
- Perry Cross Spinal Research Foundation
- Prostate Cancer Research Foundation
- QAGOMA
- Queensland Ballet
- Queensland Symphony Orchestra
- RSB Guide Dog Service
- RSPCA
- Suicide Prevention Pathways
- Traction
- Youngcare
- Youth Enterprise Trust
- Youth Focus





## Four effective ways to help us help others

If everybody helps, everybody gains.  
Your contribution could be leveraged by  
one or all of the following.

1

### Make a simple donation

A straightforward donation is always welcome.

Visit [morgans.com.au/foundation](https://morgans.com.au/foundation) or contact us by phone or email for details of how to make a direct funds transfer or regular donation.

The Morgans Foundation is an ancillary fund and is endorsed as a Deductible Gift Recipient (DGR) Item 2 and is a registered charity for tax purposes. Donations over \$2 are tax deductible<sup>2</sup>.

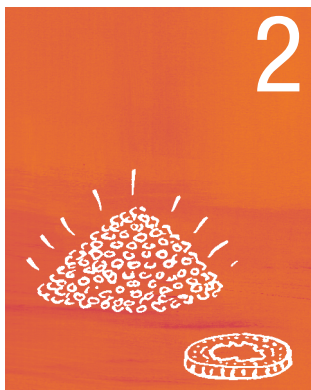
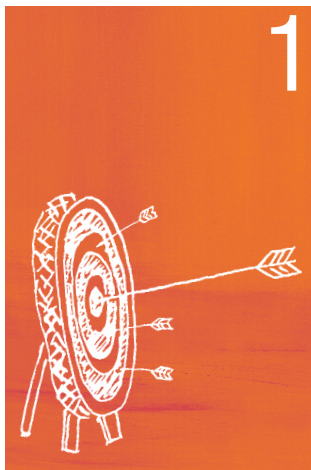
2

### Small for you. A big opportunity for us.

We have a Morgans Small Holdings Initiative that allows you to sell small shareholdings in your portfolio without any brokerage fees when you donate the proceeds to the Morgans Foundation. We provide a tax receipt and this is usually tax deductible and may create a capital loss for tax purposes<sup>2</sup>.

When many of our clients participate, this 'housekeeping' donation adds up to a very significant contribution, which can be put to work to achieve great things.

Please refer to page 4 for further details.



### Where there's a will, there's a way

Making a will is often a weighty part of financial planning. Please consider making a difference for generations to come and for your local community by leaving a bequest for Morgans Foundation. Visit [morgans.com.au/foundation](https://morgans.com.au/foundation) for general wording should you wish to consider a bequest donation.



## More about Morgans Small Holdings Initiative

Make a drop in the ocean into a wave.  
Together we can make a real difference.



**Getting involved is well worth the effort!**

Mark Pugsley and Matt Reid cycling for Hartley Lifecare in Canberra.

If you have any small-value allocations of ASX listed shares and would like to donate them to the Morgans Foundation, we will sell the shares free of brokerage charges.<sup>1,2</sup>

The advantages to you include:

- Simple way to clean up your portfolio
- Crystallises a gain or loss at a chosen moment<sup>2</sup>
- An easy way to give to a worthwhile cause
- The donation is tax deductible if over \$2.00.

### Next steps

Download and complete the Share Donation form from our website, and forward to your adviser.

### Find out more

If you would like to find out more about any of these ways to give, please:

- talk to your Morgans adviser
- visit your nearest branch; or
- see our website: [morgans.com.au/foundation](https://morgans.com.au/foundation)

The Morgans Foundation is endorsed as a Deductible Gift Recipient (DGR) from 8 February 2005. It is a public ancillary fund covered by Item 2 in the table in section 30-15 of Income Tax Assessment Act 1997.

The Morgans Foundation is a registered charity for tax purposes and any donations over \$2 are tax deductible.

1 CHESS sponsored shares must be held within a Morgans account.

2 You should obtain advice from your tax accountant prior to selling your shares, especially if held within your self-managed super fund.

# Help us help others by supporting the Morgans Foundation.

Jay, Mai and Kate from Brisbane building a house in Vietnam for Habitat for Humanity Australia.





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