



## + WE ♥ FOR-PURPOSE ORGANISATIONS

# Sustaining the gifts that keep on giving

How to optimise your resources and fuel  
an enduring legacy for the generations  
of today and tomorrow

### WHY TRUST MANAGEMENT

## Professional specialists with a purpose

+ INVESTMENT + PROPERTY + ACCOUNTING

**We're here to help our clients be in the very best position to do the most good.**

For over 20 years, we've built genuine partnerships with 180+ for-purpose organisations, helping them to do the most good by providing specialised services in property strategy, property management and financial accounting.

We're deeply motivated to help others protect and enhance people, land and culture, totally committed to delivering the best professional support, because we understand the ripple effect – when we help you, we help you to help others.

We're large enough to attract a top calibre team supported by enterprise-grade technology and systems, and small enough to have built genuine partnerships with 180+ for-purpose organisations around New Zealand, for over 20 years.

Our entire approach is to tailor our services to work for you and support your driving purpose. Everything we do is underpinned by genuine integrity and a deep commitment – because like you, we're here for a purpose, standing together for good.

+ **20 YEARS** of experience + **\$1.5 BILLION** assets managed + **180** NZ clients

### HOW WE CAN HELP

## We'll partner closely with you to become a true extension of your team

As a charity ourselves, we understand for-purpose organisations have unique challenges and different drivers to purely commercial entities, so we listen carefully and will naturally align with your own values and purpose, offering tailored, professional support to specifically meet your needs and help you focus on your goals.

**When we help you, we help you to help others.**

#### AWARD-WINNING



**Property investment  
advice and asset  
management**

#### COLLABORATIVE



**Collaborative  
approach and  
relationship driven**

#### PERFORMANCE



**Active engagement  
with tenants for  
proven performance**

#### MARKET KNOWLEDGE



**Well connected to  
optimise management  
and investments**



**+ PROVEN FOR-PURPOSE SOLUTIONS**

# Building a legacy from donations, gifts and assets

## PROPERTY MANAGEMENT

### Expert Management Property Assets

**Comprehensive reporting + strategic oversight + effective management**

Our Property Services team specialises in managing commercial real estate investments and operational assets across various sectors. With a dedicated team of eight full-time professionals overseeing a portfolio valued at over \$1.2 billion, we bring extensive experience and a strategic approach to property management.

## FACILITIES MANAGEMENT

### Ensuring Safe, Compliant and Efficient Operations

**H&S compliance + fixed asset management + proactive maintenance**

We provide industry-leading facilities management services, ensuring buildings are maintained to the highest standards while meeting health, safety, and compliance requirements. Our proactive approach minimises risk, extends asset life, and enhances operational efficiency.

## PROPERTY ADVISORY + RESEARCH

### Data-Driven, Strategic Insights

**Portfolio strategy recommendations**

Our advisory services support clients in portfolio strategy, asset management, property transactions, and project management. With access to research and trend data from CBRE, MSCI, and leading real estate agencies, we provide informed, evidence-based property advice.

## TECHNOLOGY + SYSTEMS

### Globally Recognised Property Management Software

**Real-time financial and property reporting**

We utilise Yardi Voyager, a cloud-based property management system with integrated financial reporting capabilities. Our systems include a disaster recovery plan, ensuring business continuity and security.

## ESG INTEGRATION

### Sustainable and Responsible Property Management

**ESG Compliance support and reporting**

We embed Environmental, Social, and Governance (ESG) principles into our property management approach, assisting building owners and tenants with energy efficiency, CO2 reduction, certification, and sustainability education.

## CONTINUOUS IMPROVEMENT

### Long-Term Portfolio Performance

**Strategy reviews + benchmarking**

We aim for the properties we manage to consistently outperform the market. Our annual strategy review process ensures alignment with long-term objectives, taking a top-down, bottom-up approach for strategic clarity and operational excellence.