

Sustaining the gifts that keep on giving

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

OUR PROMISE

Professional specialists with a purpose

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

20 years of experience
\$1.5 billion assets managed
180 New Zealand clients

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.

Find the perfect financial solution with our expertise - we're here to help.

HOW WE WORK

We 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. 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

BEST PRACTICE



Adoption of industry best practice

SPECIALTY



For-purpose sector focused strategies

ALIGNMENT



Purpose driven, standing together for good

AWARD-WINNING



Property investment advice and asset management



Building a legacy from donations, gifts & assets

Proven for-purpose solutions

ACCOUNTING

Strategic Financial Oversight and Advice

Monthly management accounts + budget planning + board reports

We provide comprehensive accounting services backed by deep financial expertise, including the preparation of monthly management accounts, board reporting, and statutory accounts. Our team works closely with auditors and supports budget planning, providing strategic insight your charity needs to thrive.

COMPLIANCE

Compliance and Control

Timely tax returns + audits

Our tax services include the preparation and filing of GST and PAYE returns, liaising with the IRD to keep your organisation compliant and tax-efficient, with the comfort of audited internal controls giving you peace of mind.

EDUCATION + TRAINING

Empowering Your Team with Financial Knowledge

Educated and trained staff

We provide staff training to enhance understanding of financial reports, helping your team make informed financial decisions.

BOOKKEEPING

Accurate Financial Record-Keeping + Payroll Processing

Efficient creditor payments and payroll

Keeping your financial records in order is crucial. We handle transaction recording, ledger maintenance, and bank reconciliations, ensuring your accounts payable and receivable are efficiently managed.

We manage your payroll processing, ensuring staff are paid accurately and on time while complying with regulations.

CASH MANAGEMENT

Maximise Your Cash Flow

Cash management

Our daily treasury services ensure every dollar is put to work efficiently, maintaining liquidity. We can also ring-fence restricted donations, ensuring these funds are kept secure to be used exclusively for the donor's intended purpose.

DONATION RECEIPTS

Seamless Donation Management

Timely distribution of donation receipts

We prepare and distribute IRD-approved donation receipts as required, helping you maintain transparency with donors and compliance with regulatory requirements.