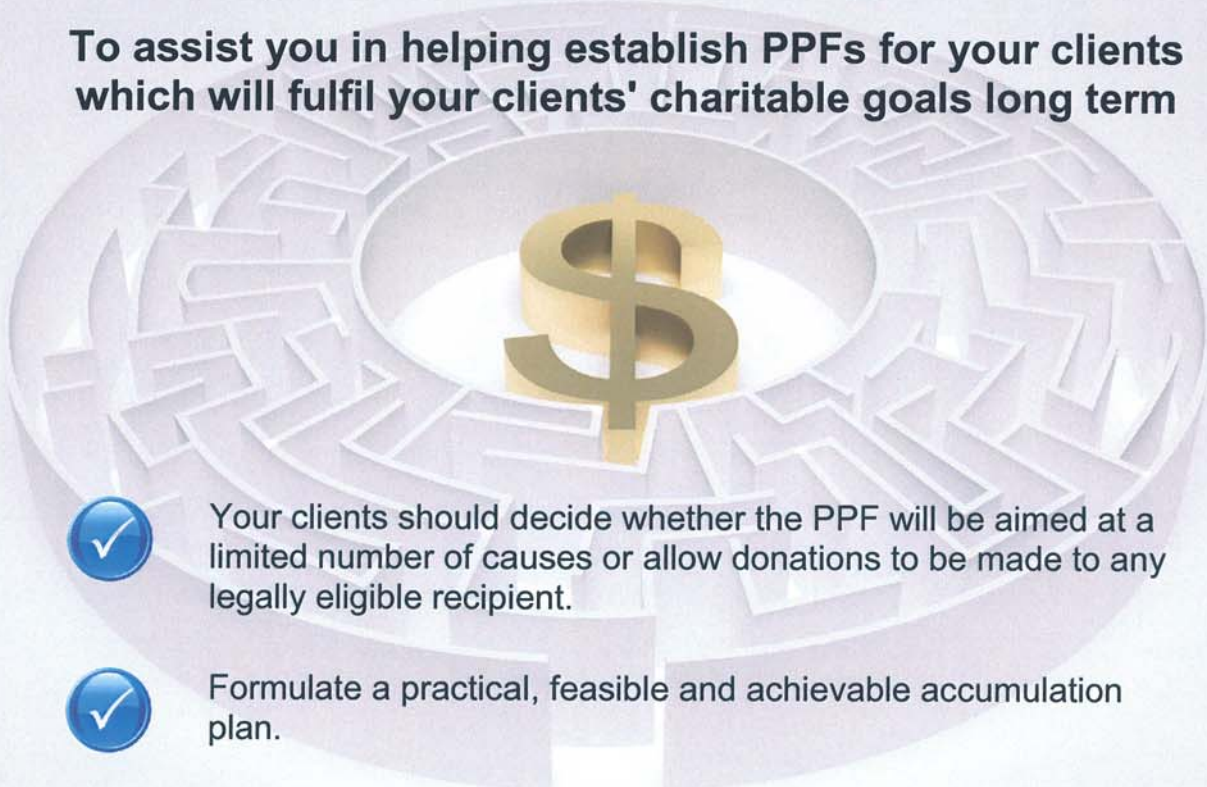


5 tips for establishing PPFs

To assist you in helping establish PPFs for your clients which will fulfil your clients' charitable goals long term

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- ✓ Your clients should decide whether the PPF will be aimed at a limited number of causes or allow donations to be made to any legally eligible recipient.
 - ✓ Formulate a practical, feasible and achievable accumulation plan.
 - ✓ Encourage your clients to appoint a trustee who will work well with your clients and will share in your clients' mission and philanthropic interests.
 - ✓ Provide your clients with some written guidelines setting out the legal parameters within which your clients should manage and operate the PPF, which they can use as a reference guide.
 - ✓ Maintain an ongoing relationship with your clients in the administration and management of the PPF to ensure that the PPF is managed correctly and efficiently with a view to maximising the funds which are available for donations to eligible recipients.