RIVER NORTH COMMUNITY FOUNDATION

OVERVIEW FOR PROFESSIONAL ADVISORS

A local giving solution for advisors and their clients who want to create lasting impact in North Brisbane and the City of Moreton Bay

River North Community Foundation helps professional advisors support clients who want to include charitable giving, community investment or legacy planning within their broader financial and estate planning.

We are a philanthropic option for individuals, families and businesses connected to North Brisbane and/or the City of Moreton Bay who want their giving to create long-term impact within the communities they know and love.

Whether clients want to support local causes during their lifetime, leave a legacy through their Will, or respond quickly during times of need - River North Community Foundation provides a trusted local vehicle for giving.

HOW ADVISORS MAY WORK WITH RIVER NORTH COMMUNITY FOUNDATION

Advisor type	Typical opportunity
Financial planners and wealth advisors	Clients selling businesses, receiving inheritances or wanting to include philanthropy within broader wealth and retirement planning
Lawyers and estate planners	Clients preparing Wills or seeking structured legacy giving options connected to the local community
Accountants and tax advisors	Clients considering strategic or tax-effective charitable giving following significant financial events
Insurance and SMSF advisors	Clients exploring charitable beneficiary arrangements or intergenerational legacy planning
Business advisors and real estate professionals	Clients wanting to direct business, property or investment proceeds toward long-term local impact
Family offices and private bankers	Families seeking a simpler alternative to establishing a standalone private foundation while retaining local community connection

River North Community Foundation

WHY ADVISORS AND CLIENTS CHOOSE A COMMUNITY FOUNDATION

A simple, flexible and locally connected giving structure

Clients can:

- Create a long-term charitable legacy, in a whole region
- Give during their lifetime or through their estate
- Support local communities they care about
- Involve children and future generations in giving
- Access a trusted local philanthropic partner
- Give strategically without establishing a private foundation
- Support multiple causes over time through one structure
- Respond to emerging community needs quickly and effectively

River North Community Foundation complements the trusted relationships advisors already hold with their clients by providing local knowledge, connections, governance, administration and community insight to support philanthropic conversations and outcomes.

GIVING OPTIONS

Giving option	How it may work	Example
Gifts in Wills and bequests	Clients leave a percentage, residual amount or specific gift to support long-term community outcomes	A long-term North Brisbane resident included a gift in their Will to support future grassroots community grants in the area.
Major donations	One-off or multi-year contributions supporting community priorities	Following a business sale, a client contributed part of the proceeds toward long-term local community investment.
Shares and securities	Donation of listed shares or investment assets	A client donated appreciated shares instead of making a cash contribution as part of their annual giving strategy.
Property and real estate	Gifts connected to property assets or sale proceeds	A retiring couple contributed proceeds from an investment property sale toward local community initiatives.
Business and workplace giving	Businesses create structured local giving commitments	A local company established an annual staff-supported giving program benefiting

Giving option	How it may work	Example
		community projects in the City of Moreton Bay.
Family philanthropy	Structured giving involving multiple family members	Three generations of a family came together to decide on annual community grants through a shared giving approach.
Life insurance gifts	Charitable giving linked to insurance or estate arrangements	A client nominated a charitable contribution through their life insurance policy as part of their legacy planning.
Memorial and legacy gifts	Donations made in honour of an individual or family	A family established a community fund in honour of a loved one who had strong ties to the region.
Regular giving	Ongoing monthly or annual contributions	A professional couple established recurring contributions to support responsive local community needs over time.

Ideal for clients who:

- Live, work or hold connections to North Brisbane or Moreton Bay
- Want their giving to stay local
- Care about long-term regional outcomes
- Are planning their estate and legacy
- Want a simpler alternative to establishing a private foundation
- Are experiencing a significant financial event or liquidity moment
- Want to involve family in charitable decision-making
- Want trusted local guidance around community needs

WHY LOCAL PHILANTHROPY MATTERS

Local giving creates stronger, more connected communities.

A community foundation allows generosity generated in a region to stay invested in that region — supporting local people, grassroots initiatives and future generations.

River North Community Foundation exists to help build a more connected, resilient and thriving future for North Brisbane and Moreton Bay.

COMMUNITY FUND OPTIONS

Clients can choose to support either long-term community investment across the region or more immediate, responsive local impact through River North Community Foundation's fund options.

RIVER NORTH GENERAL COMMUNITY FUND

Supports the long-term growth and sustainability of a permanent community asset for North Brisbane and Moreton Bay. Contributions are invested to help build an enduring corpus that can provide ongoing community benefit and local grant making for generations to come.

RIVER NORTH IN ACTION FUND

Supports responsive and community-led action addressing immediate or emerging local needs and opportunities. This currently includes quarterly microgrants designed to help accelerate grassroots ideas, local initiatives and timely community responses.

Contact

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