

# Strategic Philanthropy







“ Leave a mark that cannot be erased

Not only did you make my own dream come true but  
you’ve also made my mother’s dream come true. ”

N Ntuli, Bursary Recipient



Internationally recognised for the second time in a row by  
the **Financial Times of London**.

Recognised in the **Euromoney Private Banking Awards 2024** as South Africa’s Best for Philanthropy Advisory.

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# About Strategic Philanthropy

and the role charitable foundations play.

Philanthropy is a journey that allows individuals, families and organisations to exercise their charitable objectives and desires. This journey should be guided by values, passion, intended family legacy and a desired broader societal impact.

Over the years, Philanthropy has evolved from immediate short-term giving, towards strategic philanthropy, which focuses on sustainable, impact-driven societal change. This is supported by the increasing trends showing a growing number of private charitable foundations being formed.

A charitable foundation provides an effective way of formalising your philanthropic plan and creating a meaningful legacy that has a sustained societal impact.

The investments held within a charitable foundation are intended to grow over the long-term. Income generated by these investments is paid annually (or ad-hoc) to various chosen charitable organisations. The goal is to ensure the foundation is sustainable so that it can continue in perpetuity.

Charitable Foundations are set up as Public Benefit Organisations with SARS and donations to these foundations are exempt from Capital Gains Tax, Donations Tax, Securities Transfer Tax and Estate duty. Should the foundation be Section 18A approved, then Section 18A receipts may be issued in order for the donor to claim a tax deduction from SARS, however consultation with a qualified Tax practitioner will be required.



# Your Philanthropy Journey:

**Philanthropy is a personal journey guided by your vision, passion and requirements. We will walk this road with you, utilising our range of services that can be tailored to suit your specifications at any stage of your philanthropic journey.**

Should you have a clear idea of the difference you want to make and the organisations you wish to support, we will assist you with the implementation of your foundation, measure the effectiveness of your strategy and provide impact assessment reporting.

Should you know that you want to make a difference but not know where to start, we can assist you by developing and defining your vision to create a sustainable and meaningful impact.

We believe in being an enabler for our clients to build a legacy while uplifting the societies in which we live. We are focused on ensuring that your philanthropic journey is personal, rewarding and streamlined for you, striving for maximum social impact through your donations.

## Our role:

At Investec, we root our purpose in creating and preserving sustained long-term wealth, and seek to be a positive influence in all business activities and the societies in which we operate. Our extensive experiences as a leading Wealth & Investment Manager and Investec Corporate Social Investment facilitator have proven to meaningfully live out the core philosophy of an unselfish contribution to society.

In line with Investec's philosophy, Investec Wealth & Investment International strives to meet, and help you live out, your altruistic objectives through our Philanthropy offering. We assist you in creating the difference you wish to make by connecting you to our partner beneficiary organisations.

“ We will act to create financial value that also delivers social value in a sustainable and inclusive way. ”

Fani Titi,  
Chief executive officer  
Investec

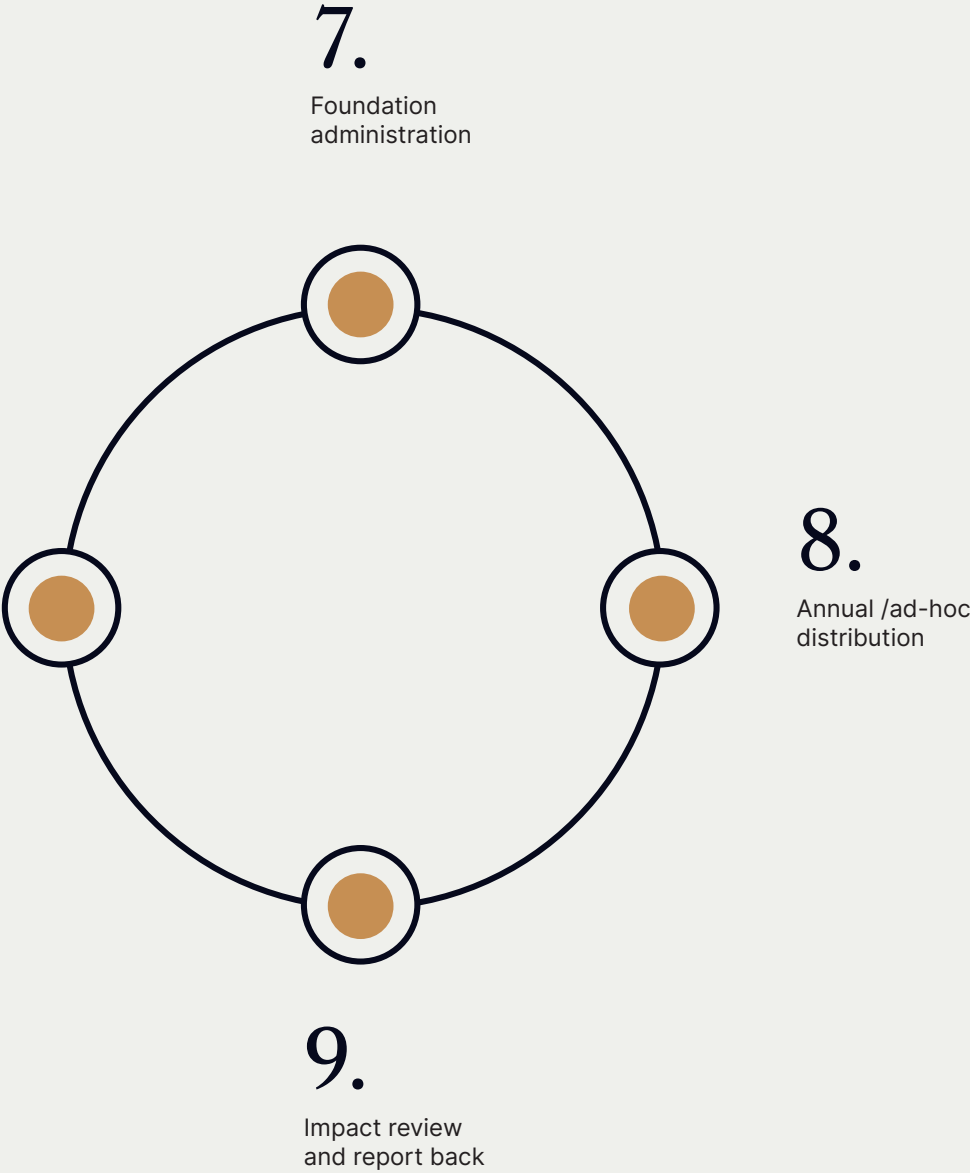




# How can we assist?

As an individual, family or business, you can choose to create a legacy through the establishment of a private charitable foundation as indicated below.

## Establishing a Private Charitable Foundation:







## STRATEGIC PHILANTHROPY

# Services

### Strategy Development

Assisting you in defining and developing your philanthropic goals, vision, family involvement and desired impact.

### Structuring

Appropriate legislative and tax guidance for the establishment of your foundation including consultation with our Tax & Fiduciary team.

### Investment Management

The capital in your foundation can be invested in one of Investec Investment Managements distinctive investment strategies tailored to meet the needs of tax-exempt entities. Your Investment Manager will spend time understanding your needs and that of your foundation and will utilise a long-term investment approach with the aim of achieving sustainable capital growth over the long-term.

### Administration & Distribution

Ongoing administration for your foundation and trustees.

Measuring results so that we can evaluate the overall social impact and report back to you.

# Benefits

### Financial

Global investment presence providing your foundation with the benefit of international perspectives and strategic insight. Sustained giving.

### Tax exemptions:

- No donations tax, security services tax, capital gains tax or estate duty.
- Section 18A (tax deduction) where applicable.

### Governance

Beneficiary assessment, due diligence and evaluation, prior to distribution and on-going through the lifecycle of the beneficiary partnership.

### Intangible

- Meaningful impact.
- Legacy creation.
- Societal upliftment.





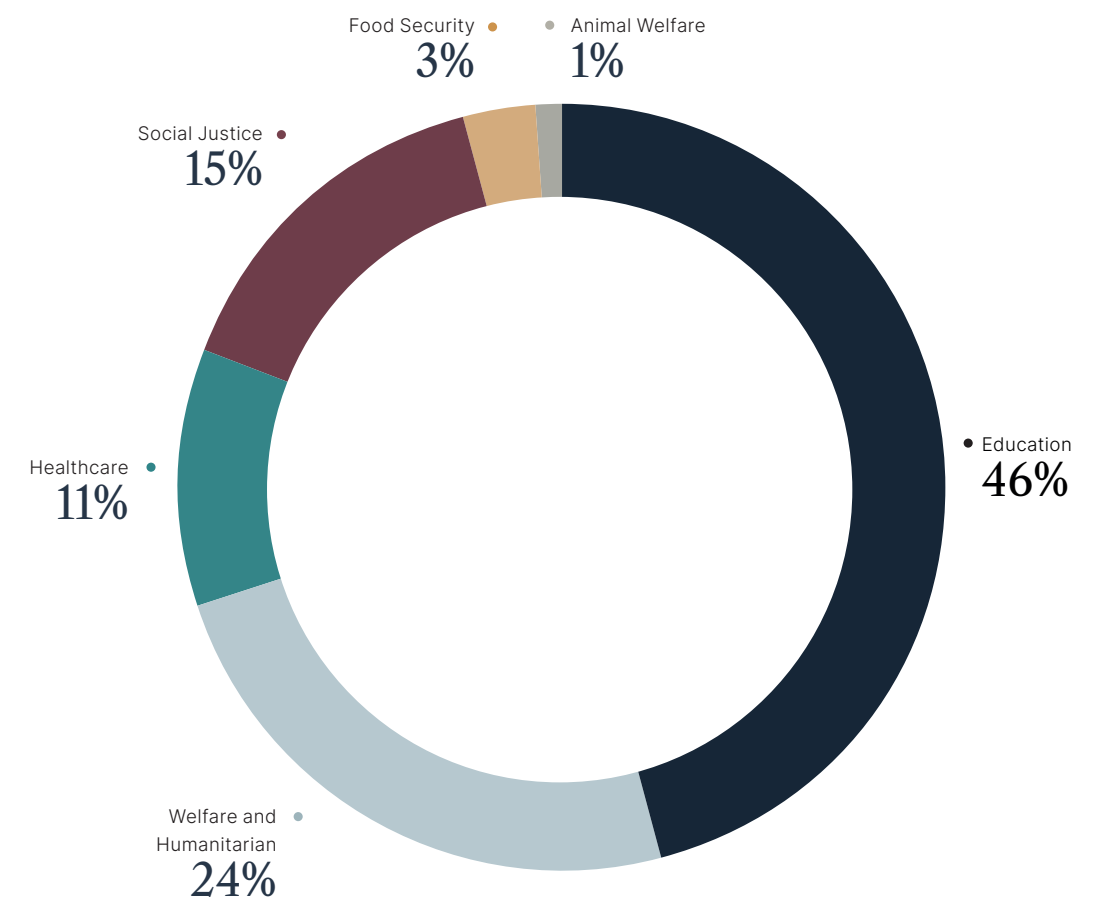
Don't leave your legacy engraved  
in stone, but rather in the hearts of people.

## STRATEGIC PHILANTHROPY

# Investec Philanthropy Beneficiary Spend:

### Your impact:

The total administered Philanthropy foundation investments for 2023 was R1.34 billion, which enabled the distribution of approximately R63.2 million to charities on behalf of our clients. These funds, distributed by Investec Charitable Trusts, are in accordance with the decisions made by the respective foundation trustees. The funds were allocated to the following sectors; 3% to Food Security, 46% to Education, 24% to Welfare & Humanitarian, 11% to Healthcare, 15% to Social Justice and 1% to Animal Welfare.



\*Stats are based on 2023 figures



## Why partner with us?

Our clients are true global citizens with humanitarian objectives. To best serve your needs, Investec offers seamless, integrated access to Investec's Banking and Investment services, both locally and internationally through Investec One Place™. We have worked with donors, Non-Profit Organisations (NPOs) and PBOs for many years and are recognised as one of the leading managers of assets for donor NPOs and PBOs in South Africa.

As your philanthropy strategy is a crucial part of your overall estate planning and wealth management, it is essential to use a specialist team with a proven track record and diverse services. At Investec Wealth & Investment International, we assign a dedicated team with expertise and experience to match your investment and altruistic needs. We take the time to understand your background, circumstances and objectives in order to develop a customised investment and philanthropic strategy with you.

Never forget that the  
strongest connection  
is a human one.



“ Build something that outlives you.

It looks like I'm dreaming when I see the school and its teachers. Ever since camp I got new friends and I'm starting to understand rules, values and behaviour.

J Mkhombo, Bursary Recipient

”

## Let's get in touch

If you are ready to begin your philanthropic journey or require any assistance on a journey already started, simply advise your investment manager or contact the Investec Philanthropy team directly.

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