



## For US donors: How to donate to the Human Rights Measurement Initiative (HRMI) via The Gift Trust

The Gift Trust, a New Zealand registered charity and philanthropic trust, has set up a fund with the US donor-advised fund RSF Social Finance to allow US tax residents to donate to charitable causes in New Zealand and receive a US tax benefit. The account is called 'Friends of The Gift Trust NZ' and any donations to it will receive a US tax receipt and will be eligible for US tax benefits. Donations can be made in cash, shares or securities.

Donations to the fund will be accumulated and then transferred to The Gift Trust in NZ quarterly, to be allocated for the purposes that the donor advises. Donors can request that their donation be transferred to HRMI by specifying the recipient as Motu Economic and Public Policy Research (Motu). HRMI is hosted by Motu, a not-for-profit charitable research institute. The Gift Trust has conducted due diligence on Motu to ensure the gift is charitable. Donations will be made quarterly, after deducting the fees below.

### Minimum amounts for donations

Due to the administration and fees involved, the minimum donation that donors can give is US\$1,000. Before donations can be distributed to Motu they will need to accumulate to NZ\$5,000, to ensure cost effectiveness.

### Fees

Two sets of fees apply - The Gift Trust will charge a fee to cover our due diligence on Motu and the gift, and to receive and transfer the funds. RSF Social Finance will charge a fee to receipt the donations in the US and transfer them to The Gift Trust.

#### The Gift Trust fee:

Donations up to \$99,999	3% of the donation value
\$100,000 to \$499,999	2% of the donation value
Over \$500,000	1% of the donation value

#### RSF Social Finance fee:

RSF will charge 2.6% per annum of the funds held in the account. This fee is per annum, so if the funds are held for 1 month by RSF before being transferred to NZ, you will only pay 1/12th of 2.6%. See below for fee examples. There is also a transaction fee of US\$350 per quarter (split between all the donations transferred that quarter).

Amount donated (\$NZD)	RSF fee			Gift Trust fee		Total fee
	% per annum	Number of months funding is held before coming to NZ	RSF fee	%	Gift Trust fee	
\$20,000	2.6%	2	\$87	3%	\$600	<b>\$687 *</b>
\$50,000	2.6%	2	\$217	3%	\$1,500	<b>\$1,717 *</b>
\$100,000	2.6%	2	\$433	2%	\$2,000	<b>\$2,433 *</b>
\$200,000	2.6%	2	\$867	2%	\$4,000	<b>\$4,867 *</b>
\$500,000	2.6%	2	\$2,167	1%	\$5,000	<b>\$7,167 *</b>

**\*Plus share of transaction cost US \$350**

## How to donate to the fund

### Wire Transfer or Stock Gift

To ensure your donation is allocated correctly to Motu via The Gift Trust, fill in the attached 'CONTRIBUTION TRANSMITTAL FORM' with the details for RSF and send it to: [kayla.leduc@rsfsocialfinance.org](mailto:kayla.leduc@rsfsocialfinance.org). Then notify your bank or broker of the RSF bank and brokerage information:

For cash sent by wire:	For securities transfer:
Bank Name: Beneficial State Bank Bank Location: 1438 Webster Street, Suite 100 Oakland, CA 94612 ABA/Routing #: 121182056 Further Credit: Rudolf Steiner Foundation, Inc. Account: 820015204	DTC #: 0164 Acct Holder: Rudolf Steiner Foundation Acct #: 2003-3992 Custodian: Charles Schwab & Co.

*\*RSF Social Finance's policy is to sell stock gifts within 3 business days. Stock gifts are valued based on the IRS guidelines using the mean value on the day of receipt by RSF.*

### By Credit Card

You may give online by credit card at:

<https://rsfsocialfinance.org/give/give-to-rsf-projects/give-today-projects>

Select "Friends of The Gift Trust" from the drop-down list and on the following page under 'Additional info' please specify Motu Economic and Public Policy Research.

### **For more information contact:**

Cheryl Spain, The Gift Trust

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[cheryl@thegifttrust.org.nz](mailto:cheryl@thegifttrust.org.nz)

[www.thegifttrust.org.nz](http://www.thegifttrust.org.nz)

Registered charity number CC40774

Anne-Marie Brook, HRMI

Ph: +64 21 1188236

[Anne-Marie.Brook@motu.org.nz](mailto:Anne-Marie.Brook@motu.org.nz)

<https://humanrightsmeasurement.org/>



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rsfsocialfinance.org

### CONTRIBUTION TRANSMITTAL FORM

How to Prepare: Before initiating a transfer of securities, bank wire or ACH to RSF Social Finance, please complete and fax this form to (415) 561-3919, email or mail to the address below. You or your financial representative must provide correct information prior to the transfer of securities to avoid delays and possible fluctuations in the trading price of the stock.

Donor / Contributor(s) \_\_\_\_\_

Fund Name \_\_\_\_\_

#### CONTRIBUTION TYPE:

Wire Transfer in the amount of \$ \_\_\_\_\_

ACH in the amount of \$ \_\_\_\_\_

#### Wire / ACH Information

Bank Name: Beneficial State Bank  
Bank Address: 1438 Webster Street, Suite 100  
Oakland, CA 94612  
  
ABA#: 121182056  
  
Account Name: Rudolf Steiner Foundation, Inc.  
Account #: 820015204

Stock Transfer - Securities transferred electronically to Charles Schwab & Co.

#### Stock Transfer Information

Financial Institution: Charles Schwab & Co.  
DTC #: 0164  
Account Name: Rudolf Steiner Foundation  
Account #: 2003-3992

<u>Name of security</u>	<u>Number of shares</u>
_____	_____
_____	_____
_____	_____
_____	_____

Date contribution due to arrive at RSF \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

*If you have questions or need further information, contact Kayla Leduc, (415) 561-6150 or [kayla.leduc@rsfsocialfinance.org](mailto:kayla.leduc@rsfsocialfinance.org)*