



# Bush Heritage Australia Capital Fund



**BUSH HERITAGE**  
AUSTRALIA

# Bush Heritage Australia

With Australia's bushland rapidly diminishing, Bush Heritage Australia works to restore the balance. Our aim is to protect biodiversity and native habitats. We work in areas where it is most needed – areas with high conservation value and low levels of protection.

Over the past 25 years Bush Heritage has grown from managing 241 hectares in Tasmania's Liffey Valley to caring for more than six million hectares right around the country. Our reserve managers, ecologists, project partners and volunteers preserve an amazing diversity of threatened landscapes and species. During this time our supporter base has also grown, from a small group of committed individuals to more than 40,000 active supporters.

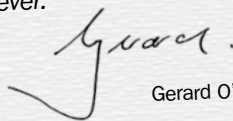
Our work is financially supported by private sources through donations and bequests from individuals, philanthropic trusts and foundations, and corporate partners.

## Bush Heritage Australia Capital Fund

To underpin generous supporter contributions, Bush Heritage Australia operates a capital investment fund. The Bush Heritage Australia Capital Fund (Capital Fund) provides an innovative and flexible opportunity for our supporters' contributions to fund multiple conservation activities into the future and help protect our vulnerable ecosystems forever.

### A message from the CEO

*"The Bush Heritage Australia Capital Fund epitomises the long term commitment that is the Bush Heritage Australia conservation model. The objective of the fund is to provide for the ongoing protection of Australia's unique landscapes and ecosystems. It represents the organisation's ambitions and capacity to fulfill this objective. I am inspired by the opportunities this Fund will provide to realise the legacies of many of our generous supporters. I'm confident that, with good stewardship, the fund will secure our living landscapes and spiritual places forever."*



Gerard O'Neill

# Management of your gift to the Capital Fund

## Investment policy:

The Capital Fund is professionally and ethically managed and its investments are selected in accordance with the values of Bush Heritage Australia, whilst also seeking to achieve a competitive financial return.

In addition to other ethical and social considerations, the investment policy ensures that under no circumstances will Bush Heritage invest in activities that have a clear link to environmental degradation including those that would directly result in:

- broad-scale land clearing;
- uranium mining and sales;
- destruction of old growth forests; or
- mis-use of chemicals and pesticides.

## Governance:

The Capital Fund is overseen by the Bush Heritage Board of Directors and the Board's Capital Fund Committee in accordance with the Bush Heritage Australia Constitution and the Capital Fund Charter and Investment Policy.

An external fund manager provides day-to-day funds management and advice. While the investment portfolio is managed by the fund manager, all assets are held directly in the name of Bush Heritage Australia which remains the sole beneficiary of those assets.

Assets within the Capital Fund are invested within the low to moderate risk profile set by the Bush Heritage Australia Board as advised by the Capital Fund Committee. Funds are invested in line with a pre-determined strategic asset allocation and may include asset classes such as cash, fixed interest securities, equities, equity funds, property and gold.





## Performance reporting:

The performance of the Capital Fund is routinely monitored by the Bush Heritage Australia Capital Fund Committee in accordance with the terms of the Capital Fund Charter. Performance of the Capital Fund will be reported to supporters on an annual basis via the Bush Heritage Australia Annual Report.

## Named fund

Supporters who choose to donate \$100,000 or more to the Capital Fund, either through their lifetime giving or through their Will, are offered the opportunity to name their contribution. For example, contributions can be named to acknowledge a bequest, a family contribution or an In Memoriam gift.

If you are interested in establishing a named legacy under the Bush Heritage Australia Capital Fund, please contact a member of Bush Heritage's bequest team to further discuss.

## Suggested wording for bequests to the Capital Fund

The following wording should be used as a guide only, and is subject to your solicitor's professional legal advice in the preparation of your Will.

"I give the residue (or percentage of the residue) of my estate; or the sum of \$(amount) to BUSH HERITAGE AUSTRALIA (ABN 78 053 639 115) to be held upon Trust and be applied towards the Bush Heritage Australia Capital Fund in accordance with the Bush Heritage Australia Capital Fund Charter."



## What are the benefits offered by the Bush Heritage Australia Capital Fund?

As Bush Heritage continues to grow, it is vital to develop a solid financial foundation to protect the landscapes we manage for the long term. The Capital Fund is currently valued at approximately \$6 million, however we aim to build the balance to \$50 million over the coming years.

Our Capital Fund enables us to build a strong financial reserve that is strategically and ethically invested to generate a perpetual income stream; a self-sustaining endowment fund for the ecosystems we seek to protect.

Your investment in the Bush Heritage Australia Capital Fund will:

1. provide for the establishment of an endowment for the long term financial security and independence of Bush Heritage and the properties it manages;
2. allow Bush Heritage to act quickly, independently and decisively when a property of conservation interest comes onto the market or a new conservation partnership opportunity emerges by temporarily borrowing against the Capital Fund (capped at no more than one third of the Fund at any time);
3. provide Bush Heritage and its supporters with the ability to leverage multiple land purchases or conservation partnerships with a single donation, while the donation itself is maintained in capital form.

## Your lasting legacy

A contribution to the Bush Heritage Australia Capital Fund is a profound and lasting legacy to protecting our landscapes and wildlife for future generations.





# Annie & Ian Mayo

*"Bush Heritage has been in our Wills since 2000 and we've always been confident that when received, money would be used by Bush Heritage to the best advantage for the reserves. When we heard about the Capital Fund we thought it would be ideal to have part of our bequest put into it. That way some of our bequest will go to dealing with immediate conservation needs and the rest will go to providing long-term financial security for Bush Heritage. We see it as further evidence of Bush Heritage's growing maturity and responsible long-term planning."*

## Further information

For a confidential discussion or for further information on the Bush Heritage Australia Capital Fund, please contact the bequest team on 03 8610 9139 or 1300 628 873 or by email to [bequests@bushheritage.org.au](mailto:bequests@bushheritage.org.au)



**Bush Heritage Australia**  
PO Box 329 Flinders Lane  
Melbourne, VIC 8009

**T:** 1300 628 873

**W:** [www.bushheritage.org.au](http://www.bushheritage.org.au)