

# ENDOWMENT FUND

Help secure a legacy  
for the future



**ACORN  
FOUNDATION**  
WESTERN BAY OF PLENTY



# OPUS ORCHESTRA ENDOWMENT FUND

**Opus Orchestra recently celebrated its 30-year anniversary.**

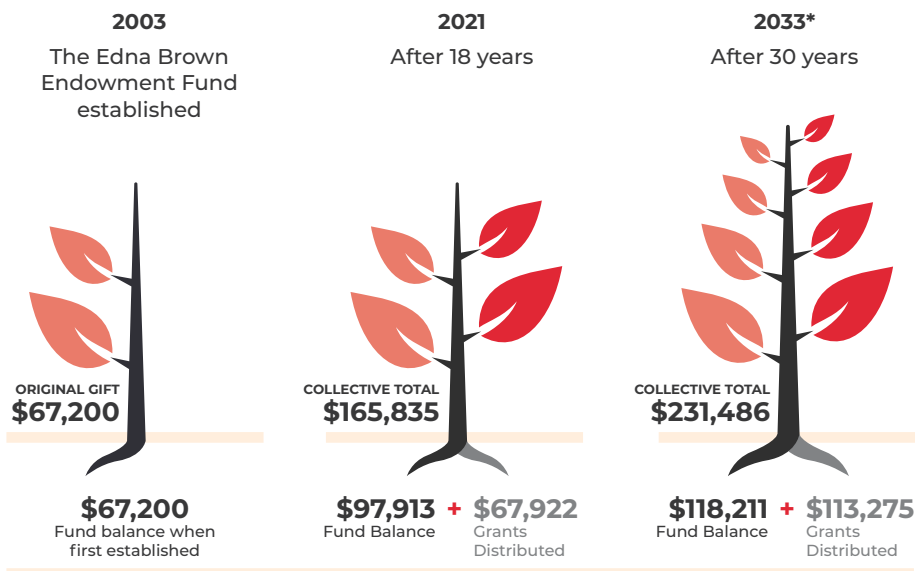
**We wish to continue our commitment to enriching lives through exceptional orchestral performances in the Bay of Plenty/Waikato regions in perpetuity, hence the decision to partner with the Acorn Foundation to create a lasting legacy for Opus Orchestra.**

The Opus Orchestra Endowment Fund will be professionally managed by Acorn Foundation, a WBOP-based community foundation which is the largest in New Zealand. Partnering with the Acorn Foundation ensures a reliable and long-term funding stream. Their economies of scale and low fee structure lead to better investment returns from every dollar that is contributed. At Acorn, the capital in the fund is invested in perpetuity, with a portion of the investment returns distributed annually.

## **Opus Pathways – help us nurture future musicians**

Having a reliable long-term funding stream will enable Opus Orchestra to prosper long into the future. It will allow Opus to continue touring inspiring concerts and to develop its Opus Pathways programme, supporting development opportunities for musicians in all phases of their careers from secondary school through to professional level.

### **How an Endowment Fund works:**



*\* Estimated growth rate of 6.5% for future years and annual distribution of 4%.*

*Chart Source: © Acorn Foundation 2021*

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Thanks to my time in Opus Orchestra, by the time I was 20 years old I had played almost all the ‘bread and butter’ of the western classical repertoire. This included most of the Beethoven symphonies, all the major works of late-period Mozart, and a huge dose of broad-spectrum Bach and Haydn. This kind of exposure is unheard of, even in Germany.

Opus has already proven itself as a successful model to engage more members of the next generation into the wider cultural scene. The orchestra must be able to continue to inspire young members of the community to seek out their passions and to provide them with real opportunities to make a difference. This is why they need our financial support.

#### ALEXANDER ARAI-SWALE

Bavarian Radio Symphony Orchestra – Current Member

Herbert von Karajan Academy of the Berlin Philharmonic – Double Bass Graduate  
Opus Orchestra – Member while studying at the University of Waikato

## YOUR CONTRIBUTION MAKES A BIG DIFFERENCE

Thanks to the commitment of our match donors, every \$1 you give will generate \$3 towards the Opus Orchestra Endowment Fund. Here's how:

### Match Donor

If you donate \$3,000 to the Opus Orchestra Endowment Fund, our match donors will also donate \$3,000, making your total contribution \$6,000 that will be invested in perpetuity <sup>1</sup>.

### 1:3 Model

Your \$3,000 donation costs you \$2,000, as you are able to claim a 33% tax credit (worth \$1,000 in this example) at the end of the year. \$2,000 turns into \$6,000, thus the 1:3 model!

### 3.5–5% Return

This percentage of our total fund will be distributed to Opus Orchestra each year, to use as we see fit. The fund is managed by the Acorn Foundation to ensure a legacy <sup>2</sup>.

Donate online via the Acorn Foundation, [www.acornfoundation.org.nz/give/donate](http://www.acornfoundation.org.nz/give/donate), and select “Opus Orchestra” as your chosen fund. Email [info@opusorchestra.co.nz](mailto:info@opusorchestra.co.nz) for more information.

<sup>1</sup> Subject to the amount of the start-up fund, which is expected to be around \$30,000. <sup>2</sup> Based on previous Acorn Foundation investment performance. Distribution commences once the total value of the Fund reaches \$50,000.



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**HELP SECURE A LEGACY FOR THE FUTURE**  
Contact us at [info@opusorchestra.co.nz](mailto:info@opusorchestra.co.nz)