

Bequest – A Gift in Your Will

Thank you for considering including a bequest in your will to support the ongoing work of Auckland Unitarians.

Bequests are received and administered **solely by The Unitarian Church of Auckland Trust Board**, a registered charitable entity under the Charities Act 2005.

The Unitarian Church of Auckland Trust Board

1a Ponsonby Road, Grey Lynn, Auckland 1011

Charity Registration Number: CC38858

Role of the Trust Board

The Unitarian Church of Auckland Trust Board:

- Holds responsibility for the Church land and buildings
- Provides facilities for religious services, education, welfare, and social justice programmes
- Manages funds held in Trust, including those designated for specific purposes
- Administers all bequests made for the benefit of Auckland Unitarians

Under the Trust Deed, the Trustees may accept gifts **only for a general or specific charitable purpose**.

For the bequest programme, **all gifts are treated as specific-purpose bequests**, ensuring that your intentions are honoured.

Current specific-purpose funds include but not limited to:

- Trust Board Ministerial Fund (used solely to employ a paid minister)
- Church Refurbishment and Historical Preservation Fund
- Organ Fund
- Capital Improvements and Equipment
- General Congregational Support (applied by the Trust Board to support the Auckland Unitarian Congregation's activities in line with the donor's stated purpose)

The Trust Board may apply funds to the Auckland Unitarian Congregation **only when doing so is consistent with the donor's specified purpose**.

Types of Bequests

You may choose to leave a gift in one of the following forms:

- **Residual** – The remainder of your estate after providing for your loved ones
- **Percentage or fractional** – A gift expressed as a percentage or fraction of your estate
- **Pecuniary or specific** – A specified gift, which may be money, property, or shares
- **Whole estate** – Your entire estate, typically left by those without beneficiaries or wishing to make a significant impact

All gifts will be applied **only** to the specific purpose you nominate.

Legal and Family Considerations

- We strongly recommend you consult your lawyer to ensure your will clearly reflects your wishes.
 - In New Zealand, gifts to registered charities are generally exempt from income tax obligations. There is no inheritance tax or capital gains tax on death.
 - Under the Family Protection Act 1955, certain family members may challenge a will if they believe they have not been adequately provided for. To reduce the risk of disputes, you may wish to:
 - clearly state your intention to make a charitable gift
 - specify the purpose for which the gift is made
 - confirm that you have considered the needs of your family
 - discuss your decision with your family and your lawyer
 - Including a brief statement of your reasoning in your will can help ensure your wishes are respected.
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Contact

If you would like to discuss any aspect of this process, please contact:

- The Chair of the Unitarian Church of Auckland Trust Board

Suggested Specific-Purpose Bequest Wording

“I give to The Unitarian Church of Auckland Trust Board, 1a Ponsonby Road, Grey Lynn, Auckland 1011, Charity Registration Number CC38858, the sum of \$_____ (or a percentage, or the residue of my Estate, or a description of the property or asset given) **to be applied for the following specific charitable purpose:**

[insert purpose, e.g. Trust Board Ministerial Fund, Church Refurbishment and Historical Preservation Fund, Organ Fund, Capital Improvements and Equipment, or General Congregational Support].

It is my clear and deliberate intention to benefit this purpose, and I make this gift after considering the needs of my family and other potential beneficiaries.

If at the time of my death the specified purpose is no longer available or practicable, I direct that the funds be applied to the nearest similar charitable purpose as determined by the Trustees.

The receipt of the Treasurer or other duly authorised officer shall be a sufficient discharge to my Executors.”
