

If you would like to consider the next steps in the process of leaving a bequest to the Kristin Foundation then these simple guidelines may help:

- If you wish to discuss your intentions with your family then we would encourage you to do so. Their memories, experiences and successes may make your decision easier.
- While we are always available to offer general guidance and support you should always seek appropriate legal advice. Your own lawyer would be a good place to start.
- While most would agree the right time to make a will is once you have accumulated significant assets or have a dependent family, bequests can be made and/or adjusted at any stage in your life.
- Refer to the four main types of bequests we have outlined in order to help you decide what your gift may be or how it may be structured.
- We are available to offer guidance on specific projects or initiatives that may be of interest to you and would benefit from your support.
- Your lawyer will act upon your instructions and so once your decision is made notify them accordingly. They will advise if a simple Codicil (addition to the will) is all that is required or a new will should be made. In most cases the Codicil is adequate.

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Kristin is a Charitable Trust, bequests are tax deductible.

Donations may be made to:

The Kristin Foundation

PO Box 300 087 Albany, Auckland 0752

Westpac Account Number: 03 1322 0696930 00

Progress with vision, integrity and love | [www.kristin.school.nz](http://www.kristin.school.nz)  
360 Albany Highway, Albany, Auckland | Ph 09 415 9566



# BEQUESTS

## LEAVING A LEGACY

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If Kristin has made a difference to your life and to that of your family and you feel strongly about ensuring the school flourishes far into the future, then planning ahead and leaving a legacy in your will is a special way to make a significant and lasting contribution.

Bequests may be given in a number of different ways but most importantly of all we are available to work with prospective donors to ensure gifts and outcomes are tailored to suit their wishes. Leaving a legacy gift is an important but hugely satisfying decision that requires careful thought and planning.

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## WE ARE HERE TO HELP

While you may prefer not to discuss your intentions, you may find it helpful to do so as we are able to offer guidance and support through the preparation and stages of planned estate giving. In addition, we would always prefer to have the opportunity to express our gratitude and the chance to discuss appropriate options for recognition for those families who do not request anonymity.

Planning for the eventual receipt of gifts and their use is extremely helpful to the school - if you have already decided to include a gift to Kristin in your will, we would be grateful to hear from you.

The four most common types of Bequests are as follows:

### PECUNIARY BEQUEST

A gift of a fixed or stated sum of money designated in a donor's will.

### SPECIFIC BEQUEST

A gift of a designated or specific item in a will.

The Kristin Foundation has the power to accept gifts or assets of any kind such as property, works of art or items of cultural significance, shares or memorabilia including collections of books, papers or other items of value. The items may be sold or retained as dictated by the donor.

### RESIDUARY BEQUEST

A gift of all or a portion of the remainder of the donor's assets after all other bequests have been made as well as debts and taxes paid.

### CONTINGENT BEQUEST

A gift in a will made on the condition of a certain event that might or might not happen. This is quite specific and fails if the condition is not made.

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If a bequest is something you would like to consider then please contact me for a confidential, obligation free discussion.

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