

BEQUEST PLAN



Full name	
Address	
Phone	
Email	
Date of birth (optional)	

Full Name (Donor) _____

Signature _____ Date _____

Full Name (Donor) _____

Signature _____ Date _____

Contact Name
(Momentum Waikato) _____

Signature _____ Date _____

Solicitor / Executor Name:

Solicitor / Executor Contacts (Address, Email & Phone):

Please return this form to:

Momentum Waikato Community Foundation

PO Box 9283, Waikato Mail Centre, Hamilton 3240.

Level 4, 127 Alexandra Street, Hamilton.

Email: info@momentumwaikato.nz. Telephone: 07 834 0404.

Momentum Waikato Community Foundation is honoured that you intend to include a bequest in your Will.
Your legacy will be directed as per your wishes and instructions in your Will.

As a donor to the Momentum Waikato Community Foundation, this Bequest Plan supports your wishes to
direct Momentum Waikato Community Foundation on the use of your funds/estate.

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The following clause is to be discussed with your Solicitor for inclusion in your Will:

Bequest to Momentum Waikato Community Foundation

I/We give _____% of the residue of my/our estate to Momentum Waikato Community Foundation, an incorporated charitable trust (Charities Registration #CC49535). Momentum Waikato Community Foundation will administer the bequest as directed in my/our Bequest Plan held with Momentum Waikato Community Foundation.

I/We direct that the receipt of any officer of Momentum Waikato shall be a full discharge to my trustees.

Pass-through Donations

Upon settlement of my/our estate, I/we would like% of my/our bequest left to Momentum Waikato Community Foundation, to be passed through to the following charitable organisations:

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Supporting Existing Momentum Waikato Funds

- a) I/We would like 1% of my/our bequest to distributed into the **Momentum Waikato Endowment Fund**.
- b) I/We would like% of our bequest to Momentum Waikato Community Foundation, tagged to the **Fund**.

Our preference is to support the following themes (health, education, animal welfare, arts and culture, children and youth, community, sport and recreation, tangata Tiriti, and/or environment), or activities or organisations:

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Named Fund (Generosity Forever)

- a) Following any pass-through donations and/or support of existing Momentum Waikato Community Foundation funds have been made, I/we wish for the balance of my/our bequest to establish a Named Fund with Momentum Waikato Community Foundation in perpetuity.

I/We wish this Named Fund to be called the

“ **Fund**.”

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- b) Momentum Waikato Community Foundation will hold the
Fund in perpetuity and will administer as per the instructions in the Deed of Gift with Momentum Waikato Community Foundation.

Your Story

The act of giving through Momentum Waikato Community Foundation for the benefit of your community is monumental. Some donors wish their stories to be shared, and we ask you to consider allowing us to tell your story through Momentum Waikato, so that others may be inspired to do the same.

Momentum Waikato will forever keep confidential whatever aspects you wish of your story.

- ☐ I/We agree for Momentum Waikato to share my/our story now (using my name).
- ☐ I/We agree for Momentum Waikato to share my/our story now (keeping my name anonymous).
- ☐ I/We agree to Momentum Waikato sharing my/our story after my death.

Please complete this Bequest Plan and send a copy back to us at Momentum Waikato, along with confirmation that these wishes have been included in your Will.

Thank you for entrusting Momentum Waikato to continue your legacy and make impactful decisions as per your instruction.

Kind regards,

Janice Lapwood
General Manager: Endowments