



THE LEGACY SOCIETY

A BEQUEST TO

THE FRIENDS OF THE UNIVERSITY
OF AUCKLAND IN THE U.S.





YOUR GIFT IS A LEGACY:

TO A WORLD-CLASS UNIVERSITY

TO EXCELLENCE IN
SCHOLARSHIP AND RESEARCH

TO OPPORTUNITY, PROGRESS
AND INNOVATION

TO A CONFIDENT AND
COHESIVE NATION

TO ENHANCE OUR
CONTRIBUTION TO THE WORLD

WITH YOUR BEQUEST TO THE
FRIENDS OF THE UNIVERSITY
OF AUCKLAND, YOU BECOME
A FOUNDING MEMBER OF THE
UNIVERSITY'S LEGACY SOCIETY



AN INVITATION TO JOIN THE UNIVERSITY OF AUCKLAND'S LEGACY SOCIETY

From its earliest days, The University of Auckland has benefited from the gifts and bequests of donors.

Their donations, large and small, have helped the University to grow and adapt to changing needs. They have contributed to new facilities, scholarships and fellowships, research, the endowment of professorial chairs, and visits by internationally renowned scholars.

Friends of The University of Auckland Inc, a 501(c)3 charitable organization in the US that supports the University, has become one of the most important benefactors to the University in recent years because of gifts it receives from donors like you.

The Friends would like to invite you to become a founding member of The Legacy Society. The Society has been established to recognize and honor those who make a bequest to the Friends of The University of Auckland; and to acknowledge the significant role bequests have played in the life of the University and will continue to play in its future.

Your bequest will be a lasting way of allowing the Friends to continue to support the University and, whether modest or substantial, will contribute to the University's continuing leadership in education and research.



A World-Class University - Today and Forever

The University of Auckland is ranked among the world's top 50 universities and is New Zealand's premier research-led university. Its benefactors, like the Friends, support it with pride with the help of people like you.

Today the University receives just a third of its funding directly from government. It is only with philanthropic support from the Friends and other benefactors that the University can provide the environment and resources to attract and retain the best and brightest scholars and students. Bequests to the Friends are increasingly important in achieving these goals.

Your support in whatever type of bequest you choose to make, gives you the opportunity to touch the lives of students and make a lasting difference.

Your legacy to learning

A bequest can be a particularly attractive option for gifting. Bequests to the Friends of The University of Auckland can be dedicated to a specific purpose, or for the general benefit of the University.

An unrestricted bequest is the most effective way to support the Friends of The University of Auckland. These bequests are used by the Friends to support the area of greatest need at any given time at the University – extending crucial research, giving assistance to scholars and students, and providing the margin of excellence for a top-50 university.

Restricted bequests for endowment can be made in your name or in memory of someone you choose to honor, a wonderful living memorial. You may request that the Friends

use them to support a particular scholarship or prize, or to fund teaching positions at all levels, an academic program, faculty, or building project at the University. If you would like to indicate in your will a specific purpose for how your bequest is to be used, we would be grateful if you or the person drafting your will contact the Friends to discuss your intentions.

By designating a portion of your estate to the Friends in your will, your estate should be eligible for a valuable tax benefit: an estate-tax charitable deduction for the full value of your gift.

Your bequest may take the form of a percentage, specific amount or residue of your estate; or specific assets such as real estate or securities, your life insurance policy or IRA. Your personal advisor can counsel you on the options best suited to your circumstances and the taxation implications specific to your estate.

Your membership in The Legacy Society is formalized upon Friends of The University of Auckland receiving notification of your bequest to them.

How to make a bequest

Bequest gifts of all sizes to Friends of The University of Auckland help the Friends support New Zealand's premier research-led university, The University of Auckland. It is important, in order to be eligible for full tax benefits within the United States, to designate your bequest specifically to the Friends of The University of Auckland Inc.





Sample bequest language

When drafting your will or adding a codicil to your existing will, you and your attorney may find the following suggestions helpful.

Bequest of specific amount

I give \$_____ to the Friends of The University of Auckland Inc, a not-for-profit organization, for the use and benefit of _____. [This is where you can specify a particular project, such as scholarships for students in a particular faculty, or leave it as an unrestricted donation to the University.]

Residuary bequest

I give and bequeath to the Friends of The University of Auckland Inc, a not-for-profit organization, [proportion] of the rest, residue and remainder of my estate, both real and personal property, for the use and benefit of _____.

Devise for a specific property

I give and devise to the Friends of The University of Auckland Inc, a not-for-profit organization, a specific parcel or property or real estate. The value of the property once sold can be used for _____.

Bequest of a percentage of your estate

I give and bequeath a percentage of my estate, _____ %, to the Friends of The University of Auckland Inc, a not-for-profit organization, to be known as the [name of the donor or other memorial] fund, for the use and benefit of _____.

Knowing what is important to you allows the Friends to suggest how your gift, pledged through your will now, can meet The University of Auckland's future needs.





Graduates Michelle, Allison and Kaye Jurgeleit

Acknowledging your contribution

We wish to thank and acknowledge all those who make bequests to the Friends of The University of Auckland.

Thank you for considering a bequest to the Friends of The University of Auckland.

For more information contact

Angela Rosati, Executive Director
Friends of The University of Auckland Inc
1209 G Street NE, Washington DC 20002-4423
Tel: 202 396 8151 Email: a.rosati@auckland.ac.nz

Richard Sorrenson, Secretary/Treasurer
Friends of The University of Auckland Inc
External Relations
Private Bag 92019, Auckland 1142, NZ
Tel: +64 9 373 7488 Email: r.sorrenson@auckland.ac.nz



**THE UNIVERSITY
OF AUCKLAND**

NEW ZEALAND

Te Whare Wānanga o Tāmaki Makaurau