



THE LEGACY SOCIETY

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# A BEQUEST TO

THE UK FRIENDS OF THE  
UNIVERSITY OF AUCKLAND





YOUR GIFT IS A LEGACY:

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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

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WITH YOUR BEQUEST TO THE  
UK 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.

The UK Friends of The University of Auckland is a UK registered charitable trust that supports the University. It has become one of the most important benefactors of the University in recent years because of the gifts received 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 recognise and honour those who make a bequest to The UK 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 UK 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 UK 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 UK 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 UK 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 UK Friends of The University of Auckland can be dedicated to a specific purpose, or for the general benefit of the University.

A bequest for general purposes is the most effective way to support The UK 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.

A bequest for specific purposes can be made in your name or in memory of someone you choose to honour, a wonderful living memorial. You may request that the UK Friends use your

bequest to support a particular scholarship or prize, or to fund teaching positions at all levels, an academic programme, 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 UK Friends to discuss your intentions.

Your bequest may take the form of a percentage, specific amount or residue of your estate; or specific assets such as land, buildings, shares or other securities. 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 formalised upon The UK Friends of The University of Auckland receiving notification of your bequest to them.

### **How to make a bequest**

Bequest gifts of all sizes to The UK Friends of The University of Auckland help the Friends support New Zealand's premier research-led university, The University of Auckland. By leaving a portion of your estate to the UK Friends in your will, your estate should avoid paying inheritance tax on that portion.

### **Sample bequest language**

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





### **Bequest of specific amount**

I give [amount in words] pounds (£ \_\_\_\_\_ ) or [amount in words] percent ( \_\_\_\_\_ %) of my estate to The UK Friends of The University of Auckland registered charity number 1090141, c/- Bircham Dyson, 50 Broadway, Westminster, London SW1H 0BL, United Kingdom. My contribution may be used to fund [specify project] at The University of Auckland. [You may specify a particular project, such as scholarships for students in a particular faculty, or leave it as a general purposes donation to the UK Friends.]

### **Devise for a specific property**

I give and devise to The UK Friends of The University of Auckland, a charitable trust in the United Kingdom, a specific parcel of property or real estate. The value of the property once sold can be used for \_\_\_\_\_ .

### **Bequest of the residue of your estate**

I give [proportion] of the residue of my estate (out of which shall be paid my funeral and testamentary expenses and my debts) to The UK Friends of The University of Auckland, registered charity number 1090141, c/- Bircham Dyson, 50 Broadway, Westminster, London SW1H 0BL, United Kingdom. My contribution may be used to fund [specify project] at The University of Auckland.

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 UK Friends of The University of Auckland.

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

## For more information contact

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**THE UNIVERSITY  
OF AUCKLAND**

**NEW ZEALAND**

Te Whare Wānanga o Tāmaki Makaurau