



THE LEGACY SOCIETY

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# A BEQUEST TO

THE UNIVERSITY OF  
AUCKLAND FOUNDATION





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  
UNIVERSITY OF AUCKLAND  
FOUNDATION, 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 University of Auckland Foundation has been established to receive and administer legacies and other donations intended for the benefit of the University.

The Foundation would like to invite you to become a founding member of The Legacy Society. The Society has been created to recognise and honour those who make a bequest to The University of Auckland Foundation; 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 supporting 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 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 that the University can provide the environment and resources to attract and retain the best and brightest scholars and students. Bequests for the benefit of the University 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, after you have taken care of your loved ones, can be a particularly attractive option for gifting. The University of Auckland Foundation receives and invests bequests for the benefit of The University of Auckland. It is registered with the NZ Charities Commission (Number CC10985).

Bequests to The University of Auckland Foundation 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 University of Auckland. These bequests are used 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 Foundation 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 Foundation to discuss your intentions.

Your bequest may take the form of a portion or the whole of the residue of your estate; a specific cash gift; or a gift of specific assets such as land, buildings, shares or other securities. Your personal advisor can counsel you on the options best suited to your circumstances.

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

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

Bequest gifts of all sizes to The University of Auckland Foundation support New Zealand's premier research-led university. You should consult your legal adviser when drafting your will or adding a codicil to your existing will to ensure it accords with your wishes.

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### **Suggested wording for specific gifts**

The following are suggested wordings for a gift of a specified cash sum or specific property.

"I give to The University of Auckland Foundation

\$ [a specific dollar amount],

**or**

[describe precisely the item of property],

free from all duties and charges, for the general purposes of the University of Auckland Foundation or for the purposes of [ \_\_\_\_\_ ], and the receipt of The University of Auckland Foundation shall be sufficient discharge to my trustees for this gift and from any obligation to see to its proper application."

If you would like to make a bequest for specific purposes please contact the Foundation. Knowing what is important to you allows us to suggest how your gift, pledged through your will now, can meet The University of Auckland's future needs.

### **A gift from the residue of your estate**

The "residue" of your estate is the pool of assets remaining once your estate's expenses have been paid and all specific legacies have been paid or satisfied.

If you wish to leave the whole or a part of your residuary estate to The University of Auckland Foundation, you will need to include the appropriate wording in the residuary provisions of your will. You will need to discuss this with your legal adviser so that the appropriate provision can be made.





Graduates Michelle, Allison and Kaye Jurgeleit

## Acknowledging your contribution

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

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

## For more information contact

Ms Laurie K. Scott  
Development Manager, Gift Planning  
Department of External Relations  
The University of Auckland  
Private Bag 92019, Auckland 1142  
Tel: 09 373 7599 Ext 88096 Mob: 021 982 844  
Email: [l.scott@auckland.ac.nz](mailto:l.scott@auckland.ac.nz)



**THE UNIVERSITY  
OF AUCKLAND**

**NEW ZEALAND**

Te Whare Wānanga o Tāmaki Makaurau