

### Suggested Clauses for Wills

#### Sample wording for inclusion in a client's will whose intent is to leave a legacy with the Taranaki Foundation.

**1. Bequest of any amount to Taranaki Foundation to be added to Taranaki Foundation's Taranaki General Community Fund**

I/ we GIVE the sum of \$\_\_\_\_\_ [or \_\_\_% of the residue of my estate] to Taranaki Foundation, an incorporated charitable trust (Charities Registration Number CC51935), to be added to its Taranaki Community Fund. I/we direct that the receipt of any officer of Taranaki Foundation shall be a full discharge to my trustees.

**2. Bequest of \$50,000 or more to Taranaki Foundation to establish a Named (Endowment) Fund**

I/we GIVE the sum of \$\_\_\_\_\_ [or \_\_\_% of the residue of my estate] to Taranaki Foundation, an incorporated charitable trust (Charities Registration Number CC51935), to be used to create a Named (Endowment) Fund named \_\_\_\_\_. A Memorandum of Wishes signed by me and dated \_\_\_\_\_ sets out my wishes regarding this endowment, including the charities or causes that I wish to benefit from distributions from this Fund. I/we direct that the receipt of any officer of Taranaki Foundation shall be a full discharge to my trustees.

**3. Bequest of any amount to Taranaki Foundation to be added to an existing Named (Endowment) Fund**

I/we GIVE the sum of \$\_\_\_\_\_ [or \_\_\_% of the residue of my estate] to Taranaki Foundation, an incorporated charitable trust (Charities Registration Number CC51935), to be added to the Endowment Fund named \_\_\_\_\_ so that it may be dealt with by the trustees of Taranaki Foundation in accordance with the terms of that Fund. I/we direct that the receipt of any officer of Taranaki Foundation shall be a full discharge to my trustees.

**4. Residue to Taranaki Foundation as default beneficiary**

IF ALL OF THE ABOVE TRUSTS FAIL, I/we give my residuary estate to Taranaki Foundation, an incorporated charitable trust (Charities Registration Number CC51935) to be added to its Taranaki Community Fund. I/we direct that the receipt of any officer of Taranaki Foundation shall be a full discharge to my trustees.

*For further assistance, please contact:*

Taranaki Foundation

[info@taranakifoundation.org.nz](mailto:info@taranakifoundation.org.nz)

027 853 4483

Taranaki Foundation is a registered charity with NZ Charities Commission #CC51935