

GIFT INTENTION FORM

Thank you for choosing Taranaki Foundation to invest your funds, ensuring maximum impact for important causes in our Taranaki region.

To make sure we understand your wishes clearly and kickstart our conversation about your giving, please complete this form with as much detail as possible. Your information will remain confidential and does not create any legal obligations.

Gift Details

<input type="checkbox"/> Individual <input type="checkbox"/> Family <input type="checkbox"/> Charitable organisation <input type="checkbox"/> Business/Corporate	
Gift type <input type="checkbox"/> Establishing a Named Fund (Endowment) <input type="checkbox"/> Bequest <input type="checkbox"/> Trust Transfer <input type="checkbox"/> Scholarship <input type="checkbox"/> Memorial Fund to honour a loved one. <input type="checkbox"/> Contributing to an already established Fund <input type="checkbox"/> One-off gift <input type="checkbox"/> Other _____	Gift amount <input type="checkbox"/> A percentage of my estate: _____ % <input type="checkbox"/> Estimated dollar amount: \$ _____ If you plan to give now and spread your gift over time, please specify your preferred instalments. <input type="checkbox"/> Monthly \$ _____ per month <input type="checkbox"/> Annual \$ _____ per year

Fund Purpose

Please select one or more of the following options, or any combination of these:																																											
<input type="checkbox"/> Unrestricted I wish to use this gift to address the greatest future needs of the Taranaki community. _____ % to be distributed through unrestricted distributions.																																											
<input type="checkbox"/> Targeted I wish to use this gift to support the following area(s) of interest: <table style="width: 100%; border: none;"> <tr><td>Arts & Culture</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Children, Youth & Family</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Aged Support</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Education</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Health/Wellness</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Recreation/Sport</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Strong Communities</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Environment</td><td style="text-align: right;">_____ %</td></tr> </table>	Arts & Culture	_____ %	Children, Youth & Family	_____ %	Aged Support	_____ %	Education	_____ %	Health/Wellness	_____ %	Recreation/Sport	_____ %	Strong Communities	_____ %	Environment	_____ %	<input type="checkbox"/> Established Community Fund I wish to use my gift to support one or more of the following groups, that have established Community Funds. <table style="width: 100%; border: none;"> <tr><td>Coach McKean Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Conductive Education Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>East Taranaki Environment Collective Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Friends of the New Plymouth Opera House Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Help a Taranaki Child Trust Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Hospice Taranaki Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>New Plymouth Riding for the Disabled Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Puke Ariki Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Taranaki Health Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Taranaki Foundation Operational Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Taranaki Retreat Legacy Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>Taranaki Youth Boost Fund</td><td style="text-align: right;">_____ %</td></tr> <tr><td>The Swingiest Fund for Generations of Art Lovers</td><td style="text-align: right;">_____ %</td></tr> </table>	Coach McKean Fund	_____ %	Conductive Education Fund	_____ %	East Taranaki Environment Collective Fund	_____ %	Friends of the New Plymouth Opera House Fund	_____ %	Help a Taranaki Child Trust Fund	_____ %	Hospice Taranaki Fund	_____ %	New Plymouth Riding for the Disabled Fund	_____ %	Puke Ariki Fund	_____ %	Taranaki Health Fund	_____ %	Taranaki Foundation Operational Fund	_____ %	Taranaki Retreat Legacy Fund	_____ %	Taranaki Youth Boost Fund	_____ %	The Swingiest Fund for Generations of Art Lovers	_____ %
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<input type="checkbox"/> Tagged I understand that if my gift is \$50,000 or more, I can direct the growth income to a registered charity or charities of my choice. _____ % is to be distributed to the registered charity of my choice: _____																																											

Additional Comments

Please share any further relevant information about your interests and aspirations.
This will help the Taranaki Foundation better understand your charitable giving intentions:

I/We are interested in exploring the next step of making a planned gift to Taranaki Foundation.
We would appreciate discussing our intentions further with a member of the Foundation team.

Please contact me by: Phone Email

Donor Details

Name(s):		
Address:		
Phone:	Email:	Date:

Taranaki Foundation is a registered charity (CC51935).

Please return this form to:
Taranaki Foundation
 PO Box 719, Taranaki Mail Centre,
 New Plymouth
info@taranakifoundation.org.nz

Thank you for considering making your charitable gift through the Taranaki Foundation.
Please reach out with any questions;

Josh Hickford
 Chief Executive
 027 462 1412
josh@taranakifoundation.org.nz
taranakifoundation.org.nz

**With Taranaki
 Foundation,
 your generosity
 today will make a
 lasting difference
 for the future of
 our region.**