



# Creating Your Legacy



Taranaki Foundation

## Supporting Community, forever.

Planning your Will is a thoughtful way to protect your loved ones and leave a lasting impact on your community. Yet only 55% of New Zealanders have done so, and just 6% include a charitable gift. A Will ensures your wishes are followed, eases the burden on your loved ones, and can support the causes you care about for the long term, without impacting your current financial needs.

Even a modest gift can grow over time and create a permanent source of funding, helping the people, projects, and places you care about for generations to come.

### How it works

- Your gift is invested through Taranaki Foundation's perpetual endowment model, where the original capital is protected.
- Income from the fund is distributed to the community as grants each year, while the original gift is preserved and the fund continues to grow.
- You can choose how your gift supports the community, or leave it unrestricted to meet priority local needs.
- Your generosity is stewarded with care, transparency, and long-term vision.

### Your Gift. Your Choice

Giving is deeply personal. You can leave a percentage of your estate or a specific sum in your Will. You may also choose to give over time, shaping your gift to make the greatest impact on the community you care about.

- Gifts of \$50,000+ can establish a Named Endowment Fund in your name.
- Smaller gifts can support existing Community Funds or the General Endowment Fund.
- Undirected gifts are added to the General Endowment Fund, supporting the greatest future needs of our Taranaki community.
- Every gift, regardless of size, is valued and appreciated.

### Practical Tips

Things to consider when preparing your Will:

Your loved ones:

Consider your partner, family, children, and close friends, and how you would like to provide for them.

Your estate:

Consider your assets, such as property, savings, and possessions, as well as any debts or loans.

Children and dependents:

If you have children under 18 or others who rely on you, decide who will care for them.

Gifts to charity:

You may wish to include a gift to causes that have been important to you during your lifetime.

Professional advice:

A lawyer can help ensure your Will clearly reflects your wishes and is prepared correctly.

*"Even a small part of what you leave behind can make a big difference. Charitable giving isn't just for the wealthy. Imagine if all my friends followed suit, imagine what a difference we could make to our local community."*

**Janine Evans,  
Taranaki Foundation  
Donor**

## Making it happen

If you would like to establish your own Fund, we will work with you to complete a simple establishment form.

This helps us understand the causes you care about and how you would like your generosity to make a lasting impact.

### Suggested wording for your Will

Once your form is complete, you (or your lawyer) can include the following in your Will:

"To transfer (x% of the residue of my/our estate or whatever sum you wish to leave) to Taranaki Foundation (CC51935) to be paid into the "XYZ Endowment Fund" which I/we have established to be dealt with by the trustees of the Foundation in accordance with the terms of that Fund."

If you are leaving a gift to an existing Fund, we will connect with you to understand your giving wishes. Then you (or your lawyer) can add the following in your Will:

"To transfer (x% of the residue of my/our estate or whatever sum you wish to leave) to Taranaki Foundation (CC51935) to be paid into the "XYZ Fund" to be dealt with by the trustees of the Foundation in accordance with the terms of that Fund".

### What is a Community Foundation?

Community Foundations are local, independent, and not-for-profit. They run a well-proven model of giving which has been growing across the world for over 100 years, and they are now established in 18 regions across Aotearoa New Zealand. Community Foundations build long-term, reliable funding streams for their local communities by investing and growing the donations they receive.

### Taranaki Foundation

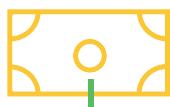
Taranaki Foundation is your Community Foundation. We exist to help nurture and build the prosperity of our region. We do this by connecting generous people with projects and causes they are passionate about.

Governed by a group of experienced volunteer trustees, we provide a trustworthy vehicle for you to contribute to the local causes that really matter to you. We provide the charitable framework, expert financial oversight and governance to ensure your giving generates the maximum good and creates an inter-generational legacy.

## Together, we are building reliable long-term funding streams to support our community forever

Taranaki Foundation understands that building healthy, vibrant communities requires long-term, sustainable support and resources. That's why we invest and grow the gifts we receive, however big or small, to create positive change in our region — both now and for generations to come.

### Your donation



### is invested and grows over time to help



### our region



### and our community



Thank you for considering making your charitable gift through the Taranaki Foundation. Please reach out to talk through your options, we are here to help.

**Josh Hickford** Chief Executive  
027 462 1412  
[josh@taranakifoundation.org.nz](mailto:josh@taranakifoundation.org.nz)  
[taranakifoundation.org.nz](http://taranakifoundation.org.nz)  
TARANAKI FOUNDATION \ Creating

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