



“Including the University in my will aligns with the desire of my wife and I to help others. It’s a form of gift giving that is very rewarding. We feel we are assisting and encouraging future generations of students to achieve their dreams, and assisting the University to continue and advance its vital role in society.”

ANONYMOUS BEQUEST DONOR

For more information on including a gift to the University of Auckland in your will, please contact:

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Our commitment to you

If you are considering leaving a gift in your will to the University of Auckland, we will make you the following commitments:

- We will always respect your privacy. We recognise and appreciate that your will is personal to you. We will handle whatever gift you leave us with care, sensitivity and respect.
- Many donors choose not to tell us about gifts in their will; but if you do tell us, we will respect your wishes in terms of how we contact and talk to you in the future.
- We will use your gift carefully and cost effectively so that it has the greatest impact, and give you the opportunity to connect with the work we do during your lifetime.

Your will can be a legacy for change

Creating a legacy is a powerful thing. A way to live on symbolically, to continue to “be there” for those you love and for the things that matter to you.



Why support the University of Auckland in your will?

Have you ever considered how you might write the final chapter to your life? A chapter that extends into the future carrying your values and goals. Leaving your mark. Making a difference. Honouring the memory of someone important to you.

The University of Auckland has been privileged to be part of such conversations when people are writing their wills.

Research-led universities like the University of Auckland are, by their very nature, future focused. They have always been creators, conservators and disseminators of knowledge and operate for the long term.

Philanthropic funding, which includes gifts in wills, is critical to the University fulfilling its role of creating a better future for the people of Aotearoa New Zealand. Each student, researcher or lecturer will in some way affect and influence our future.

From supporting a talented student from an underprivileged background to achieve their academic potential to funding a researcher searching for a breakthrough cure for a disease, gifts of all sizes in wills really do make a difference.



Making a gift in your will

A will is very personal, and we strongly advise you to consult your legal advisor before drafting a new will or updating an existing one. We are always happy to discuss your wishes and intentions without offering direct legal or financial advice on wills or estate planning.

If you are considering including a gift to the University of Auckland in your will, here is some suggested wording to ensure your wishes are carried out:

“I give and bequeath to The University of Auckland Foundation, a charitable trust registered with the New Zealand Charities Commission (CC10985) or The University of Auckland Medical and Health Sciences Foundation (CC30871)

\$ (amount in words) dollars

OR % (a specific percentage) of my estate

OR % (the whole or a specific percentage) of the residue of my estate

OR (describe precisely the item of property) free from all duties and charges, as a contribution to The University of Auckland Foundation / The University of Auckland Medical and Health Sciences Foundation to be applied for (see below*), for which the receipt of The University of Auckland Foundation / The University of Auckland Medical and Health Sciences Foundation shall be sufficient discharge to my trustees.”

* This short phrase could simply describe the type of recipient, programme or academic discipline to which you may wish to direct your gift. If you have specific wishes, we recommend that this becomes “The (donor/family/friend’s name) (Scholarship/Fellowship/Research) Fund”. You may also wish to provide a supporting document (a statement of intentions) that would be held at the University.

Your statement of intentions

In addition to your will, you can also choose to draw up a ‘statement of intentions’. This represents the collaboration of you the donor and the University of Auckland in striking the best balance between achieving your objectives and supporting programmes and projects of ongoing importance to the University.

A ‘statement of intentions’ could include information on:

- The distribution schedule for funds (commencement date, tenure, frequency, etc).
- The process of distribution (decision-makers, application process, etc).
- Recipient’s criteria (faculty or department, programme or research objectives, qualifications and grades, personal and financial situation, contribution to community or profession, etc).
- Type of allowable expenditure (tuition fees, capital expenditure, research materials, staff position, etc).
- How the University and the recipient will recognise and acknowledge you or your nominee as donor.

