

All Bequest amounts and purposes remain confidential, unless you agree that they may be made public. Please choose whether you wish your Bequest to be either named or recorded anonymously.

'The \_\_\_\_\_ Bequest'

Or

I wish my Bequest to remain anonymous.

My address and other contact details:

My name \_\_\_\_\_

My address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Home phone: \_\_\_\_\_

Work phone: \_\_\_\_\_

Mobile phone: \_\_\_\_\_

Email: \_\_\_\_\_

**Lawyer or family representative**

Name: \_\_\_\_\_

Contact: \_\_\_\_\_

Signed \_\_\_\_\_

Date \_\_\_\_\_

Upon completion of this form please mail to:  
PO Box 202, Nelson 7040,  
67 Waimea Rd, Nelson 7010, New Zealand.  
gina@nelsoncollege.school.nz

# NELSON COLLEGE TRUST FOUNDATION



*Philanthropy will mean  
the difference between the  
maintenance of a great  
College and the evolution  
of an extraordinary one.*

GARY O'SHEA  
HEADMASTER NELSON COLLEGE

*partners in pursuit of excellence*



The generosity of Old Boys and parents over many decades has been a vital factor in Nelson College achieving a status that is widely recognised today.

It is this legacy that lies at the heart of the College.

So many who have spent a significant part of their lives here, whether as students, staff or parents, have recognised that the College shaped them in a number of major ways.

These strong memories have inspired people to designate a place for Nelson College in their will, most commonly donating a percentage of their estate.

Please consider furthering this wonderful tradition of giving by making a bequest to your College.

## Types of bequest

There are two main types of bequests:



### General Bequests

These will be left to the Nelson College **Trust Foundation (Endowment) Fund**.



### Specific Bequests

Please contact the Headmaster to discuss the specific gift you have in mind. Gifts can be directed to an existing individual donor fund or, with negotiation, to the establishment of a new fund, or can be directed to an immediate operational use within the College.

#### How much should I give?

Please give only what you can afford, and after providing for your family. Bequests normally specify either a fixed dollar amount or a percentage of a donor's estate. We are grateful for every bequest, whatever its size, and every bequest will help maintain and shape the direction of the College.

#### Bequest wording

This will normally take a wording similar to the following:

"I hereby give and bequeath to the Nelson College Trust Foundation, New Zealand, the sum of \$\_\_\_\_\_

OR \_\_\_\_\_ per cent of the balance of my estate for:

A **General Bequest**, to be directed to the Nelson College Trust Foundation's Endowment Fund.

A **Specific (restricted) Bequest** to be directed to:

An existing individual donor's fund, please specify:

\_\_\_\_\_

Establishing a new individual donor's fund, please specify: \_\_\_\_\_

*(After negotiation and agreement with the Headmaster and the Nelson College Trust Foundation Chair.)*

I hereby declare that the signature of the designated officer of the Foundation shall be sufficient discharge to my executor/s."

#### PLEASE NOTE

The new law on unrestricted giving dictates that a gift may be of any size and this donation is tax deductible.

#### IMPORTANT

The Nelson College Trust Foundation is approved by the IRD Charitable Organisations for tax purposes, and is registered under the Charities Act.

#### Please let us know about your bequest gift

If you do make a bequest, it would help our work enormously if you could let us know using the enclosed advice form. Please be assured that all gift and bequest amounts and associated detail are strictly confidential.

#### DISCLAIMER

*This brochure has been designed to provide general information and guidance only and is not intended to offer professional, legal or other advice. We recommend that donors considering making a bequest to The Nelson College Trust Foundation consult their own legal and financial advisors in this matter.*

To The Chairman

### Nelson College Trust Foundation

#### Confidential bequest advice

On the understanding that my Bequest may be altered by me at any time should circumstances necessitate, I am pleased to advise that I have made the following Bequest to *The Nelson College Trust Foundation* in my Will. The following information is provided for the Nelson College Trust Foundation's records on the understanding that the details remain confidential.

I intend that my Bequest benefits College as follows:

*Please select one of the below or describe your Bequest's intended purpose or use.*

A **General Bequest**, to be directed to the Nelson College Trust Foundation's Endowment Fund.

A **Specific (restricted) Bequest** to be directed to:

An existing individual donor's fund, please specify:

\_\_\_\_\_

Establishing a new individual donor's fund, please specify: \_\_\_\_\_

*(After negotiation and agreement with the Headmaster and the Nelson College Trust Foundation Chair.)*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



*partners in pursuit of excellence*