

# PARTNERS IN PROTECTION – ŌHĀKĪ

## Leave a gift to QEII in your Will

Your support helps us to continue our vital conservation work with private landowners, as we strive to inspire and support New Zealanders to protect and enhance open spaces of ecological and cultural significance.

Leaving a gift in your Will is one of the many ways you can support QEII National Trust – Ngā Kairauhi Papa to continue our important work. This is your opportunity to manage, enhance and protect the land forever. This lasting legacy will make a real difference to Aotearoa New Zealand both now and for generations to come.

## Join QEII as a Partner in Protection

The QEII Partners in Protection - Ōhākī legacy programme has been set up to honour the generosity of individuals and families who plan to leave gifts in their Will to QEII. When you notify us that we have been remembered in your financial planning, you will be invited to join this group of supporters. This prestigious group of benefactors includes a growing number of like-minded friends and supporters of QEII. Partners in Protection are kept informed of news, activities, and events throughout the year.

Being a valued part of the programme means we can thank you in your lifetime and share our mutual passion for protection, enhancement and preservation of New Zealand's land. We will, of course, respect your wishes should you prefer to remain anonymous.

## How your gift can help

We can assist in helping you realise your vision for your gift, whether you choose to support a specific project or direct your gift for general purposes – meaning that it will be directed to the area of highest need.

It's a common misconception that only wealthy people can leave donations. A gift in your Will is welcomed whatever your financial situation and is an essential factor for ensuring QEII's good work continues for years to come.

## Our commitment to you

**QEII will always honour your wishes.**

We would welcome the opportunity to thank you for your gift to QEII in your lifetime. You may choose not to tell us about a gift in your Will or Family Trust, but if you do decide to share your plans with us, we can work with you to understand more about your wishes. We will use your gift carefully and efficiently so that it has the greatest impact, and give you the opportunity to connect with our current work.

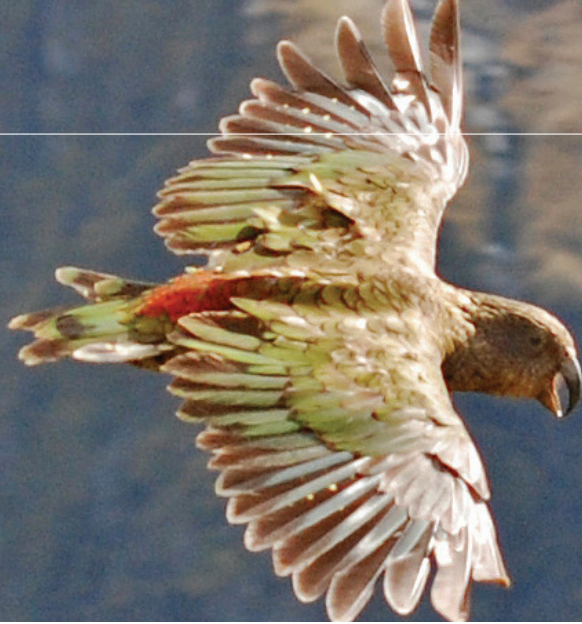
## Next steps

If you decide you would like to leave a gift to QEII, you may first want to discuss your wishes with your immediate family and or those close to you. We strongly recommend you seek independent legal advice when writing or altering your Will, codicil, Family Trust or Inheritance Trust beneficiaries list.

## Information for your solicitor or financial advisor

If you already have a Will, the wording below will help your legal advisor prepare a codicil to reflect any changes you wish to make. The same wording can be incorporated into your bequest clause if you are writing a Will for the first time.

(Delete as appropriate): *"I give Queen Elizabeth The Second National Trust (NZ Registered Charity Number CC28488) the sum of \$..... (or a percentage, or the residue of my Estate, or a description of the property or asset given) for the general purposes of the Charity (or a stipulated purpose) and declare that the receipt of Queen Elizabeth The Second National Trust to be a full discharge to my trustee"*



## Common questions answered

### What can I leave to QEII?

Most of our donors choose to leave a sum of money. Please contact us to discuss non-cash gifts, such as property, as we have restrictions around what we are able to accept.

If you would like to leave money, you have two choices – you can leave a specific sum of money, or you can leave a share of your estate. The advantage of leaving a share of your estate is that the value of your bequest will not be eroded over time with the effects of inflation, which would be the case if you specify a sum. A dollar today may not be worth the same in 10 years' time.

You can also choose to leave a residual gift – the balance of your estate once all specific bequests have been allocated.

### I am thinking of leaving a gift to help a specific area or purpose. Is this possible?

Yes. You are welcome to identify the areas or purpose you would like to support. Current projects are likely to change in the future, and providing us with some flexibility means your gift will be used where the need is greatest. However, if you do wish to choose a specific purpose, we can discuss this with you to ensure we can identify a suitable fund or project, and can honour your wishes in the long term. In the case of endowment funds, we have specific wording you can use.

### Do I need to draw up a new Will to include my gift?

No. A document called a codicil can be used to add a QEII gift to an existing Will. A legal adviser will need to be consulted for this but it is inexpensive, quick and very easy to do. If you have a Family or Inheritance Trust in place, you may also wish to consider naming QEII as a beneficiary, or include QEII in a "Memorandum of Guidance" or "Letter of Wishes" so that your intentions to leave a charitable gift can be honoured by the Trustees.

### Do I have to tell QEII about my intentions?

This is at your discretion and we appreciate that writing your Will and giving thought to your inheritance is a very personal decision. We encourage you to notify us of your intentions so that we may express our gratitude during your lifetime and include you as a member of our recognition programme, Partners in Protection. This doesn't mean you are obligated in any way to leave a gift, and we respect your freedom to change your mind at any time.

## Get in touch

We would welcome the opportunity to tell you more about how to leave a gift in your will to QEII, and how it will be used. If you would like to talk to us in confidence, please contact Bryna O'Brien, Fundraising Manager on:

**DDI:** 04 471 4196

**Mobile:** 027 295 5369

**Email:** [bobrien@qeii.org.nz](mailto:bobrien@qeii.org.nz)

You can also pass this information on to your solicitor or financial advisor or have them contact QEII directly. It is helpful for us to know if you have left a gift in your Will. This ensures that we can acknowledge your generous support and allows us to plan ahead. There is no need to specify an amount, just a simple phone call or email to tell us you have made a provision through your Will or Family Trust, or that you are thinking about making a provision and wish to discuss the details.