

Gift Plan

Thank you for choosing Momentum Waikato to invest your funds, ensuring maximum impact for activities in our Waikato region.

To help us understand the nature of your giving, please complete and return this form.

	Gift amount	Gift type	Donation Distribution
<input type="checkbox"/> Individual <input type="checkbox"/> Family <input type="checkbox"/> Charitable organisation <input type="checkbox"/> Business/Corporate	\$ _____ <i>If your gift is to be spread out over time, please specify your monthly or annual instalments:</i> \$ _____ monthly \$ _____ annual	<input type="checkbox"/> Regular Pledged Gifts <input type="checkbox"/> One-off gift <input type="checkbox"/> Bequest <input type="checkbox"/> Trust Transfer	<input type="checkbox"/> Today Fund <input type="checkbox"/> Waikato Future Fund (endowment) <input type="checkbox"/> Named Fund (endowment) <input type="checkbox"/> Waikato Regional Theatre <input type="checkbox"/> Women's Fund

Donor Profile

Full name/s	
Organisation	
Address	
Mobile	
Alternative phone #	
Email	

I wish to support the following 'Vital Signs' pillars (if left untagged, your gift will be distributed at the discretion of Momentum Waikato):

- | | | |
|---|---|---|
| <input type="checkbox"/> Children & Youth | <input type="checkbox"/> Culture & Arts | <input type="checkbox"/> Communities |
| <input type="checkbox"/> Economy | <input type="checkbox"/> Education | <input type="checkbox"/> Environment |
| <input type="checkbox"/> Health | <input type="checkbox"/> Recreation | <input type="checkbox"/> No Preference (<i>Momentum Waikato will direct untagged funds to the greatest area of need</i>) |

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- **Today Fund** – the charity or project I choose for distribution of my donation is:

- **Waikato Future Fund** (Momentum Waikato endowment) – 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, and that I will receive an annual donor report.

The registered charity of my choice is:

- I/we wish to set up a **Named Fund** with the following title:

(Please also complete 'Named Fund' form.)

- **Bequest** – I/we will seek independent legal advice and our lawyer will communicate our confirmed wishes to Momentum Waikato (please complete relevant 'Bequest' form).
- **Transfer a Trust** – I/we will seek independent legal advice and our lawyer will communicate our wishes to Momentum Waikato (please complete 'Trust Transfer' form.)

Signed by Donor/s

Full name (please print) _____

Signature _____ Date _____

Full name (please print) _____

Signature _____ Date _____

Signed by Momentum Waikato

Full name (please print) _____

Signature _____ Date _____

Please return this form to:

Momentum Waikato Community Foundation
P O Box 9283, Hamilton 3240
Tel 07 834 0404. Email info@momentumwaikato.nz

Momentum Waikato is registered with the NZ Charities Commission #CC49535

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