

Memorandum of Wishes for Bequests \$50,000+

To Establish A Named Endowment Fund

I/We wish to gift a Bequest to create a **Named Endowment Fund** managed by the Momentum Waikato Community Foundation (“Momentum Waikato”). I/we understand that these *wishes* are not legally binding, and that Momentum Waikato will not establish a separate trust or sub-trust.

Full name(s) and Address: _____

Phone: _____ **Mobile:** _____

Alternative phone #: _____ **Email:** _____

Date of Birth: / / / **Date of Birth:** / / /

Please note my/our wishes and understandings regarding this donation.

1. The name of the Fund will be _____ .

2. I/We wish that: *(choose a, b and/or c)*
 - a) _____ per cent of our Fund’s income be distributed to any charitable purpose/s within the Waikato region, at the discretion of the trustees of Momentum Waikato.

 - b) our Fund’s income be distributed to Momentum Waikato’s areas of interest and/or purpose-specific funds (refer to list of current funds), in the percentages listed:

 - c) our Fund’s income be distributed to the following registered charity or charities, in the percentages listed:

3. I/We confirm provision for this Named Fund has been made in my/our will and/or trust documentation.

4. Momentum Waikato will provide an annual report to my/our executors (or their nominees) on how much has been distributed and to whom, for as long as they wish to receive it.

5. My/our choice of beneficiaries may vary in future, so I/we therefore reserve the right to notify Momentum Waikato of any such changes.

6. I/We reserve the right to change the name of our Fund.

7. I/We acknowledge that where I/we have referred to the distribution of income, this is subject to how much of the fund Momentum Waikato deems practical to distribute each year.
8. Where I/we have specified a charity to be benefited, if in the judgement of Momentum Waikato it no longer meets our values and/or the legal tests for charitable purposes, then Momentum Waikato is to redirect our fund's income to a registered charity or charities that have values and/or charitable purposes equivalent to those that led to our original choice.
9. Although Momentum Waikato will keep a separate accounting record of the amount in the Named Fund, all funds administered by Momentum Waikato are pooled and invested accordingly, with the income shared proportionately.
10. I/We understand that due to the generous circumstances of how Momentum Waikato was established, donors are not required to pay a fee for setting up this new Named Fund.

Authorisation for Name Disclosure

Momentum Waikato appreciates being able to publicly identify its donors in its marketing, so as to recognise their generosity and encourage further support from the community. Momentum Waikato will only disclose its donors' names with their specific permission.

Yes, I/we agree to being publicly identified as a donor(s) to Momentum Waikato.

No, I/we wish to remain anonymous.

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