



**AGE
CONCERN
NEW ZEALAND**

He Manaakitanga
Kaumātua Aotearoa

Your Will and Age Concern

Leaving a Lasting Legacy



Dignity, Well-being, Equity, Respect

Have you thought about your lasting legacy?

You can leave a remarkable legacy of hope and support of our work by choosing to include Age Concern New Zealand in your Will.

Gifts left to Age Concern New Zealand are absolutely vital to our work. They enable us to support our essential services for older people. They help us to expand our work and look for new ways to tackle the issues facing people as they get older.

Leaving a legacy of kindness is a powerful way to show that you want to contribute to a better future and protect the rights of future generations of older New Zealanders.

We understand that when making a Will, your first priority is to provide for your loved ones.

We appreciate your gift, no matter how much the amount. Big or small, your legacy will make a difference in the years to come.

Thank you

“ Leaving a bequest to Age Concern is a no brainer. It is an investment into the futures of the family and loved ones I am leaving behind, ensuring they have the opportunity to live happy and healthy later lives. ”
Vicky, 45.

Why do I need a Will?

Making a Will might seem daunting, and it could be something you've been putting off.

However, it is the best way to make sure your wishes are carried out after you have died, and it can bring family or loved ones a lot of comfort at a difficult time.

Your Will allows you to specify how you want your personal matters to be managed when you die. This includes how your property and financial assets will be administered or distributed and any special wishes for your funeral.

Helpful things to consider when making or changing your Will.

- How do you want your family and friends to be provided for?
- How do you want your property and financial assets to be managed and distributed?
- Do you have any special requirements for your funeral?
- Who would you like to appoint to be the executor of your Will? – An executor is an individual or organisation that can be legally responsible for carrying out your wishes.

“ Age Concern stands out in the New Zealand charity landscape, as a compassionate, thoughtful and effective advocate for older people. ”
Paul, 73.

What happens if I don't have a Will?

If you die without a Will, everything you own will be divided up according to the law, not according to your wishes, which could cause anxiety and stress for your family and friends.

I need to make a Will.

How do I get started?

It is best to use a lawyer to write up your Will. If you don't already have one, a family member or friend may be able to recommend someone you could use.

When making your Will you should work with a professional advisor to ensure:

- Your Will is prepared in accordance with the law.
- Your Will is clearly worded and accurately reflects your wishes.

The process of making a legacy to Age Concern New Zealand is quick and straightforward, regardless of whether or not you have already written a Will.

Please ensure adequate provisions are made for your family, dependents and any other beneficiaries before making a gift in your Will to Age Concern New Zealand.

“ *It is a privilege to be able to leave a gift that endures beyond my lifetime, that can help transform the lives of future generations of vulnerable older people.* ”

Marilyn, 68.

What can I put in my Will?

- The name of the person that you want as your executor, who will see that your wishes are carried out.
- The beneficiary/beneficiaries (individuals or organisations) you wish to benefit from your estate, and what parts or percentage of your estate they are to receive.
- Instructions on your funeral service and whether you would like to make special provisions for organ/tissue donation.

Why should I leave a gift in my Will to Age Concern New Zealand?

Age Concern is the charity in your neighbourhood for older people, their friends and whānau. Founded on generosity, Age Concern brings people together across generations, places, and cultures.

New Zealanders are living longer than ever before. By 2034 more than 1.2 million New Zealanders will be 65 and over. There will be more people aged 65+ than children aged 1-14 years. With a growing and ageing population, the demand for our services is only going to increase.

We all hope to leave the world a little better than we found it. By choosing to leave a gift in your Will to Age Concern New Zealand, you can be certain that your kindness will live on, helping some of the most vulnerable older people find advice, support, and friendship. It will help us tackle the issues facing people as they get older, such as costs of living, food and housing poverty and social isolation and loneliness.

Is there any suggested wording I should use to add a gift to Age Concern New Zealand to my Will?

Your lawyer, solicitor or trustee company can help you in drawing up or amending your Will to include your gift to help our vital work.

You have several options:

Residuary legacy

Once your debts and any funeral expenses, and the gifts of specific items or set amounts of money are paid, the balance of the estate is called the 'residuary estate.'

A gift of part of this is called a 'residuary legacy.' Such a gift is commonly stated as a percentage of the residue. For example, "I give to Age Concern New Zealand XX% of my residuary estate."

This is a popular choice as it automatically adjusts to the changes in the value of your estate. It also effectively inflation-proofs your gift!

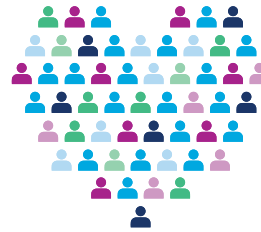
A residuary legacy is the best thing you can do to help Age Concern New Zealand.

Specific legacy

This is a gift of a monetary amount, such as \$5,000.



Talk to your lawyer about the best option for you



We'd love to hear from you

Confidential Reply Form

We love hearing that you've left a gift in your Will. It gives us the opportunity to say thank you and keep you up to date on our work.

Age Concern New Zealand recognises that your Will is confidential. Your information will always be treated with complete confidence. You are under no obligation to tell us, but we really appreciate it.

Please tick the appropriate box and enter your details.

- I have already included a gift to Age Concern New Zealand in my Will.**
- I would like to discuss leaving a gift to Age Concern New Zealand.**

Please contact me.

Letter **Phone** **Email** **Text**

Name _____

Address _____

Postcode _____

Phone _____

Email _____





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