

Six easy steps to make a will

1. Advice

A Will is a legal document. Legal words have defined meanings so it can be unwise to write your own, just one simple mistake can render it invalid.

2. Value your assets

You may be surprised to find out how much your total assets are worth.

3. Who do you want to benefit?

People who benefit from your Will may include family, relatives, friends and charities. Make a list of names and addresses and specify what you would like each beneficiary to have. You can make specific bequests of property, possession or money but remember that what seems like a considerable amount now may be significantly reduced by inflation as the years pass. Nominating a percentage to each beneficiary is a fair way to distribute your estate. You can leave a percentage of your estate to the Otago Community Hospice.

4. The residue of your estate

After your estate is assessed and specific gifts distributed, funeral and administration expenses and any other debts allowed for, anything left over is called the residue. You can give all or part of the residue to the Otago Community Hospice.

5. Your executor and trustee

Your executor and trustee are responsible for carrying out your wishes and for paying your beneficiaries. You can appoint family or friends, a trustee or your solicitor.

6. The legal document

To have legal status, your Will is signed and witnessed by two people who are not beneficiaries or your Will or another legal advisor will guide you. Keep your Will in a safe place. You can decide to keep your Will at the bank or with your solicitor or trustee company, it is a good idea to keep a copy for yourself. Tell a family member or close friend where the original Will is kept.

More Information

This pamphlet has been designed to give you some assistance with making a Will and show you how you can help the Otago Community Hospice.

If you would like more information, please contact:

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BEQUEST PROGRAMME

Reviewed: 22 September 2014

About the Otago Community Hospice

Otago Community Hospice provides care and support for people who are dying and their families, completely free of charge. We support our patients and their families wherever they want to be, and for most of them, that's at home. We aim to keep people in their homes, symptom-free, for as long as possible.

How your bequest will help

You can make a lasting gift to help those who need our care.

A bequest is an excellent way to contribute to the Hospice, thereby enabling the continuation of our services.

We are 58% funded by the Southern District Health Board, leaving a \$2 million shortfall we must fundraise from the community each year.

Why do you need a Will?

Your Will is a unique and clear record of your wishes. Making a plain English legal Will enables you to provide for the needs of your family, as well as the charities you choose to support.

Many of us put off making a Will, but if you die without leaving one, the law, not you, will decide what happens to your estate. There is no guarantee that those you care about will be taken care of.

If you have not yet made a Will, the good news is that this is usually a very simple, inexpensive process and the benefits are enormous.

Thinking about your Will

Before you make a Will, or change your existing one, you need to think carefully about how you wish to distribute your assets. You may choose to make a charitable donation to ensure the organisation you have supported during your lifetime is helped in to the future.

The perfect way to help

To ensure services of the Otago Community Hospice remain free and accessible to all indefinitely, we have established a Foundation Trust. Capital from this fund will be invested and the interest will be used to support the hospice services.

Contributing to this fund with a bequest means you can express your thanks and support in a practical way.

How do I make my Will?

As a Will is a legal document, it is important to seek the right advice and wording. Your solicitor or trustee company can also help you with this.

How do I update my existing Will?

Your solicitor or trustee company can easily add a codicil to your existing will to incorporate your bequest to the Otago Community Hospice.

The Monarch Club

We wish to extend our heartfelt thanks for your gift. Please let us know if you have left a bequest to us as we would like to thank you for this special gesture.

When you let us know, you will automatically become a member of **The Monarch Club**. You will receive an invitation to functions twice a year. Please be assured your membership and bequest is kept completely confidential.

You can provide a gift for general funding

Sample wording for a gift to the Otago Community Hospice:

"I give the Otago Hospice Trust, Dunedin (____% of the residue of my estate, or sum of money, or write a description of property or assets) for general purposes, for which the receipt of the Chief Executive Officer, or other proper officer, shall be full and sufficient discharge to my trustees."

Or you can provide a gift to the Foundation Trust

Sample wording for a gift in perpetuity to ensure the future of the Otago Community Hospice:

"I give the Otago Hospice Foundation Trust, Dunedin (____% of the residue of my estate, or sum of money, or write a description of property or assets) for investment purposes, for which the receipt of the Chief Executive Officer, or other proper officer, shall be full and sufficient discharge to my trustees."

Your gift makes a real difference.

Here are testimonials from two people who have benefited from the services of the Otago Community Hospice.

"For a beloved sister the Hospice was an oasis of care till her death. Our appreciation is expressed every day and our Wills are designed to benefit the Otago Community Hospice."

G & R, Dunedin

"My husband was so well cared for; I will always be thankful. I have also appreciated the ongoing support. I have stated in my Will that the Otago Community Hospice will benefit when my house is sold,"

G M, Dunedin