



Leave a lasting legacy.

How to make a gift in your Will
to The Selwyn Foundation

Helping vulnerable older people
in our community.

The Selwyn
Foundation 

The Puckey Apartments in Selwyn Village take their name from Mrs Gertrude and Minnie Puckey, both of whom left substantial gifts in their Wills to The Selwyn Foundation, helping us to care for vulnerable older people over the many decades since.



Gertrude Puckey



Minnie Puckey



With your help, we can provide more help.

Supporting older people in need has been at the core of The Selwyn Foundation's mission, ever since it was established back in 1954. Today, we are one of New Zealand's oldest charitable foundations, and our mission is unchanged - indeed, it may be more important now than ever before.

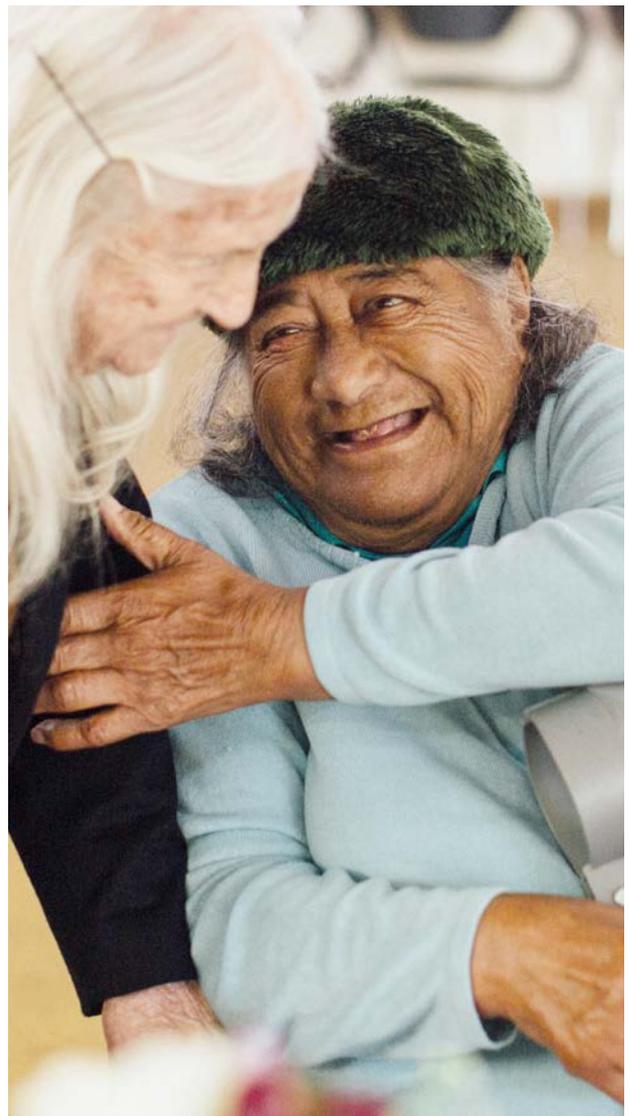
The number of New Zealanders aged 65+ is predicted to double, reaching 1.5 million in the next 25 years.

New Zealand's population is ageing rapidly, while home ownership is simultaneously declining. The result is a growing tide of people retiring with no assets and few savings. Many struggle to find affordable rental housing, and increasing numbers find themselves in financial hardship, and increasingly live alone, isolated and lonely.

Not surprisingly, this sort of vulnerability can significantly affect older people's wellbeing. It increases the risk of mental health issues and long-term medical conditions, which leads to frailty and reduced life expectancy.

Not all older people will need help, but many will - and right now there isn't enough. We need to provide more help for vulnerable

older people. And we can. With the legacies left by generous donors like you, The Selwyn Foundation can significantly increase support for those in need.



Here's what we're

To achieve the greatest positive impact in the community,
The Selwyn Foundation focuses all our efforts on four key areas:

Loneliness

An estimated 20% of older people experience loneliness - up to 140,000 New Zealanders. It's an epidemic linked to greater risk of health problems, and increases the chance of an early death by 30% to 60%. For those later in life, it increases the risk of dementia. That's why our Selwyn Centres are so important - weekly drop-in centres where, for a nominal fee, anyone over 65 can call in for a cup of tea, games and activities, and a friendly chat.



Hardship

Increasingly, older people are reaching retirement still with mortgages or rent to pay. These people often walk a financial tightrope from one superannuation payment to the next, and any unexpected expense can simply prove too much for an already-stretched budget. Our Hardship Support Grants provide access to dentists, optometrists, and other necessary services, giving some of the most vulnerable people in our society a better quality of life.



doing to help.

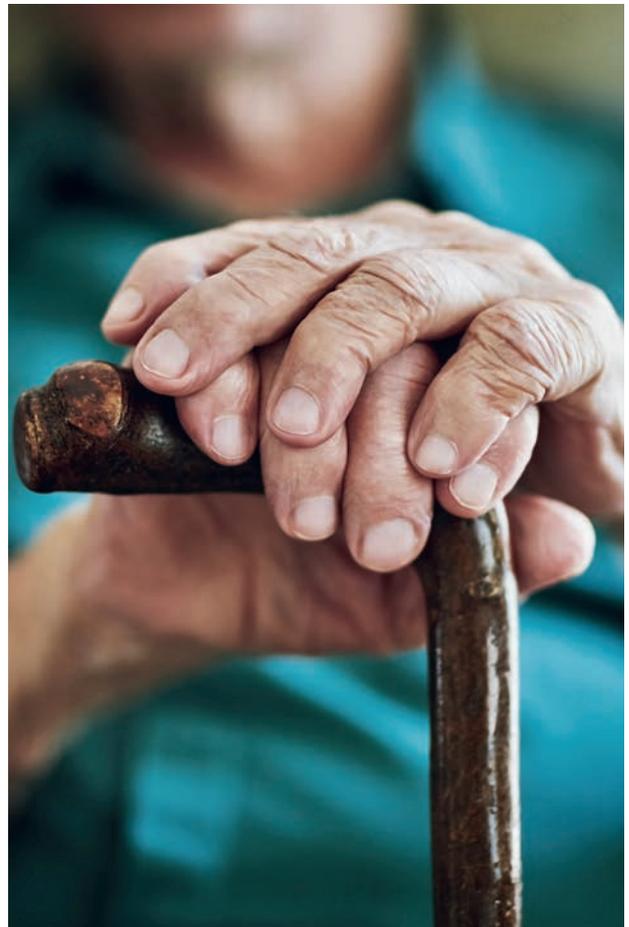
Housing

New Zealand is in the grip of a housing crisis, and for many older people, healthy and affordable homes are simply an impossible dream. That's why we work on initiatives like Haumarū Housing, our partnership with Auckland Council that provides over 1400 rental properties to older Aucklanders with a housing need. It's our vision to ensure even the most vulnerable elderly people around us have a safe and healthy place that they can call home.



Spirituality

The Selwyn Foundation grew from some of Auckland's earliest faith-based charitable movements, and our faith still carries us forward today. But spirituality takes different forms for different people - whether that's religion, or anything else that gives life meaning. It's increasingly important as we age, so we provide chaplaincy and counselling to seniors in residential care environments and online. Our services help seniors of all faiths, and none.



Make a gift in your Will to make a difference.

By remembering The Selwyn Foundation with a gift in your Will, you'll create a lasting legacy, and you also help New Zealand become a better place for those who follow.

There are many ways to leave a gift in your Will to The Selwyn Foundation, and you should consider which option works best for you. Some examples are:

You can give **a specific amount of money or percentage of your estate** for The Selwyn Foundation. This type of gift, sometimes called a pecuniary gift, allows you to nominate a specific amount of money or percentage to give to The Selwyn Foundation.

You can leave **a particular item or items** such as property, land, works of art, jewellery, shares etc. It needs to be specifically named in your Will and given to The Selwyn Foundation.



You can leave **the residue of your estate** after specific items and/or monetary gifts (if any) have been given. Here you make a gift to The Selwyn Foundation of what is left over (or a percentage of the residue) in your estate after all expenses and debts have been settled and your loved ones have been provided for.

A residuary gift is one of the best types of bequest donations, because it maintains the relative value of your gift and automatically adjusts to changes in the value of your estate. This is the type of gift we ask our supporters to consider, because it upholds the intended value of the gift over time.

You can make **a gift to take effect after the death of your spouse** – your spouse would have your estate for as long as he/she lived, then the indicated portion would revert to The Selwyn Foundation.

You can make **a gift through a perpetual trust** that will provide ongoing financial support.

You can gift **a life insurance policy** on your own life or on the life of another nominated person, with The Selwyn Foundation nominated as the sole beneficiary. Alternatively, you could make the bonuses of your life insurance policy payable to The Selwyn Foundation.

We're forever grateful to past donors like Ivan Ward, whose generosity enabled the construction of our state-of-the-art residential care home, the Ivan Ward Centre in Selwyn Village.



Ivan Ward



How do I leave a gift in my Will?

Choosing to remember The Selwyn Foundation with a gift in your Will is the perfect way to help New Zealand become a better place for those who follow. More and more people are choosing to leave a gift in their Will. It's quite simple and can be accomplished in just a few easy steps...



1: Talk to us

Call or email The Selwyn Foundation to discuss leaving a gift in your Will and ask any questions you may have. (This step is optional.)

2: Include us in your Will

Make contact with a legal advisor, lawyer or Will provider and ask them to: a) make a Will (if you do not already have one) or b) make an amendment in your existing Will. Provide them with the “Will wording”, detailing your gift to The Selwyn Foundation. We've included wording here that you can copy and paste, send via email, or simply dictate over the phone. (You may of course take guidance for the wording from your own legal advisor.)

3: Let us know

Once the process is complete, please let us know when you have received your new or updated Will with the inclusion of your gift to The Selwyn Foundation. (This step is optional but recommended.)

To get started, simply contact The Selwyn Foundation on **(+64) 9 849 9206** or email **giving@selwynfoundation.org.nz**.

A gift in your Will to The Selwyn Foundation goes on giving forever. We thank you in advance on behalf of the many people you will help.

What wording do I put in my Will?

A Will is personal, however we are always available to discuss your wishes and intentions if you would like. While including a gift to The Selwyn Foundation is a simple process, we thoroughly recommend you consult your legal and financial advisors in the drafting or changing of any Will. If you are considering making a gift in your Will to The Selwyn Foundation, here is some suggested 'Will wording' to ensure your wishes are carried out:

I give and bequeath to The Selwyn Foundation, a registered charity with the New Zealand Charities Commission (CC23251),

the residue of my estate OR

_____ % of the residue of my estate

OR my _____

(describe specified items)

OR the sum of \$ _____ free from all duties and charges, as a contribution to The Selwyn Foundation to be applied for 'greatest needs', for which the receipt of The Selwyn Foundation shall be sufficient discharge to my trustees.



Perhaps you'd like to help right now?

Of course, you don't have to wait until you've passed away before you make a difference. There are several ways your generosity can start helping others (and you can derive satisfaction from this) during your own lifetime.

A one-off or regular donation

Whether you make a one-off or regular donation, you are creating a positive change in the lives of some of New Zealand's most vulnerable and needy older people. Every donation, no matter how big or small, makes a difference.

A Living Legacy

For many people, the word "legacy" conjures up ideas of death, inheritance, and material possessions. Legacy is all about life and living and caring about our world during our lifetime. When you're alive, you have a unique opportunity to draw meaning by helping others in some way that is meaningful to you.

Although similar to a normal one-off or regular donation, there are some important differences. When you make a Living Legacy, your gift gets invested so that its value lasts forever (unlike general donations that are used annually). It can be of any value, however it's most often a significant amount and transformative in nature.

It is possible to pledge a donation that you might otherwise have gifted in your Will, but instead it is gifted (maybe over a period of time) while you are still alive. There may be certain intentions you would like achieved with this gift that can be fulfilled in your lifetime.

Some of the benefits of making a Living Legacy gift are:

- Your generosity will have everlasting benefits and will leave a long lasting legacy.
- NZ resident taxpayers receive a 33.3% tax credit on any gift over \$5 per annum (up to a limit of total net taxable income for all gifts combined in a given tax year).
- You can experience the joy and the impact your gift is making during your lifetime.



We thank you for your consideration.

Should you have further questions about writing or updating your Will, more detailed information can be found on **selwynfoundation.org.nz**. If you'd like someone to contact you directly about leaving The Selwyn Foundation a gift in your Will, or to discuss your giving options, please call on **+64 9 849 9206**, or email **giving@selwynfoundation.org.nz**.



The Selwyn Foundation

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