**Bequests ~ leaving a gift to the Church in your Will**

***Why make a bequest?***

A bequest is a way of making provision for a gift of part of your estate (assets that you own) to another party. It is an instruction (provision) you have to make in your Will for your instructions to be given effect.

A Will is essential for a number of reasons. It allows you to express your love for family and friends and to benefit organizations that are important to you by providing for each of them. It also helps ensure the orderly administration of your estate. Your family solicitor is the best person to help you with a Will. He or she can assist you with all your estate planning and provide a valuable and unbiased perspective.

***What sort of bequest should I make?***

A bequest is the easiest way to leave a gift to the Parish or the Wellington Diocese. It is a way of giving thanks to God for the life He has provided and to assist the future of the Parish. A bequest allows you to give more than what you probably give annually and it doesn't affect your day to day living costs.

If you look around our Parish you will see a history of what others have given, on the walls, pews, or the windows and in the special funds held by the Parish to ensure a sustainable future.

Bequests can be directed to general purposes or to any special purpose you wish to support. The most flexible arrangement, and the preference of the Parish, is to make it for “general purposes”, leaving it to the Parish (through Vestry) to discern the best use of your gift to meet the needs for mission and ministry. If a special purpose is your preference, it can only be used for the special purpose you state in your Will. You should try to ensure that the wording in your Will is broad enough to be workable over time as the needs of the Parish change over the years. If you make the language of the special purpose too narrow, then the bequest cannot be allocated to another purpose, even if it is an area of greater need; at worse, the bequest may not be able to be used.

The simplest way to make a bequest is to state a monetary figure in your Will. When making a bequest, however, it is wise to inflation-proof your gift. The best way to do this is to give a named percentage value of your estate. Bequests can also include other assets such as shares, artwork or antiques, which can be sold and the funds used to fulfil your bequest. Bequests can include a specific artefact for use in the Parish (e.g. a Bible, crucifix, etc), but this can also limit how the gift can be used, and may create problems later, especially if the expectation of your family is that the they have some say in any future decision with regards to that artefact.

***How do I make a bequest in my Will?***

Any bequest needs to be made out to ‘The Wellington Diocesan Board of Trustees’ as this is the charitable organisation of which our Parish is part. The Diocesan charities’ number is CC31568.

*The following information is supplied as a basis for instructions to solicitors in drawing up Wills in which it is desired to bequeath sums for church purposes in the Diocese of Wellington.  It is important that bequests should be so worded as to make it clear that the beneficiary object is connected with the Anglican Church in the Diocese of Wellington.*

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| **Suggested wording for Wills** | **Comment** |
| “To the Wellington Diocesan Board of Trustees for the general purposes of the Anglican Diocese of Wellington” … | Your bequest will go to the Diocese to discern what the needs in the Wellington Diocese are, and it is up to the Board of Trustees to decide if our Parish gets to see any of the bequest. |
| “The Wellington Diocesan Board of Trustees for the general purposes of the Parish of Pauatahanui in the Anglican Diocese of Wellington” … | This will direct your request to go to our Parish to be used for general purposes. |
| *Add* “It is my wish that the bequest be applied at the Vestry’s collective discernment as is appropriate with Parish needs at the time of the bequest”. | This additional wording provides flexibility on how the bequest may be used (and makes it clear that it is at Vestry discretion subject to need and based on when the bequest is made). |
| *Add …* “and if the said Parish has ceased to exist, for its successor Parish” … | This additional wording provides flexibility if there are boundary changes affecting the Parish, which can happen from time to time. |

 Further information on making bequests may be obtained from the Diocesan Manager, P O Box 12046, Wellington, or if you would like to talk more about making a bequest, please do not hesitate to contact us.

Susan Worthington Peter Dennison March

People’s Warden Vicar’s Warden 2018