

PROFESSIONAL ADVISORS

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Suggested Clauses for Wills

Sample wording for inclusion in a client's will whose intent is to leave a legacy with Hawke's Bay Foundation. Please get in touch with us should you need any further support or information.

Bequest of any amount to Hawke's Bay Foundation to be added to Hawke's Bay Community Fund (General Endowment Fund).

I/we GIVE the sum of \$_____ [or ___% of the residue of my estate] to Hawke's Bay Foundation, an incorporated charitable trust (Charities Registration Number CC28009), to be added to its General Endowment Fund, known as Hawke's Bay Community Fund. I/we direct that the receipt of any officer of Hawke's Bay Foundation shall be a full discharge to my trustees.

Bequest of \$25,000 or more to Hawke's Bay Foundation to establish a Named (Endowment) Fund.

I/we GIVE the sum of \$_____ [or ___% of the residue of my estate] to Hawke's Bay Foundation, an incorporated charitable trust (Charities Registration Number CC28009), to be used to create a Named (Endowment) Fund named _____. A Memorandum of Wishes signed by me/us and dated _____ sets out my wishes regarding this endowment, including the charities or causes or purpose that I wish to benefit from distributions from this Fund. I/we direct that the receipt of any officer of Hawke's Bay Community Foundation shall be a full discharge to my trustees.

Bequest of any amount to Hawke's Bay Foundation to be added to an existing Named (Endowment) Fund or existing Community Fund.

I/we GIVE the sum of \$_____ [or ___% of the residue of my estate] to Hawke's Bay Foundation, an incorporated charitable trust (Charities Registration Number CC28009), to be added to the Endowment Fund named _____ so that it may be dealt with by the trustees of Hawke's Bay Foundation in accordance with the terms of that Fund. I/we direct that the receipt of any officer of Hawke's Bay Foundation shall be a full discharge to my trustees.

Residue to Hawke's Bay Foundation as default beneficiary.

IF ALL OF THE ABOVE TRUSTS FAIL, I/we give my residuary estate to Hawke's Bay Foundation, an incorporated charitable trust (Charities Registration Number CC28009) to be added to its General Endowment Fund, known as Hawke's Bay Foundation Fund. I/we direct that the receipt of any officer of Hawke's Bay Foundation shall be a full discharge to my trustees.