

A Lasting Gift

Hans Wouters explains how a bequest can change the Trust's future



Independent and free. A bequest will help secure the future of people with an SCI.

Why would you leave money to the New Zealand Spinal Trust (NZST) ... or any charity for that matter? Let me share with you a short story of the difference a recent bequest has made to the NZST.

The story starts in 2017 when a local lawyer emailed me to let me know of a gift that had been planned in a will he'd recently helped a client with. Elizabeth had chosen to leave us \$500,000 and was happy for us to know about it beforehand.

As you can imagine, I was excited, thrilled, humbled, curious – all these emotions all at once! I asked if I could meet this kind and generous lady.

In fact, Andrew Hall and I met up with Liz on several occasions. She never wanted to discuss her generous gift – we were able to thank her, but the rest of our conversations were about current affairs.

Liz was a lively, intelligent, practical woman. She'd been a nurse her whole working life and I believe this may have influenced her decision to leave a gift to NZST. She had no children of her own, but she had a loved goddaughter who would inherit the bulk of her estate.

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—Hans Wouters

Liz's gift gave our organisation the certainty and confidence we needed.

When Liz passed away in 2019, Andrew and I attended her funeral, and met her goddaughter. Many times, gifts in wills appear out of the blue once the estate has been finalised – I was very grateful that I'd been able to meet Liz and thank her and share stories of our chats with her goddaughter.

This generous gift has underwritten our current fundraising. Prior to this our fundraising programme was, as with much of our service, achieved on the smell of an oily rag and often reactionary – we didn't have the luxury of a dedicated staff member to drive our fundraising, let alone one with expertise in the area and the ability to work towards a sustainable model which could grow and support broader services.

Liz’s gift gave our organisation the certainty and confidence we needed to invest in our future.

We hired a fulltime fundraiser, who is making a difference to how we communicate with our supporters, while also ensuring we are proactive in finding new opportunities. Our fundraising is now able to be spread across many different sources, reducing our reliance on grants (which like so many things in this COVID-19 world, are less certain than they used to be).

Earlier this year we received another email from a lawyer informing us of a bequest that was due to be paid. This one was a fraction of the size of Liz’s gift, however it was received with the same sense of excitement and humility.

But also, with some sadness – as I never got to thank the giver in person. She had experienced our support as part of her own SCI journey many years previously and had continued to enjoy our *Spinal Network News* magazine since then. I like to think this provided an ongoing connection – but it would have been wonderful to have thanked her over a cup of tea.

Every gift left to NZST in a will is a significant gift. It means someone has thought highly enough of the support we provide to want to see it continue after their passing.

They have given careful consideration to how they could best show their appreciation for the māhi our team does. They have chosen to provide very practical assistance for those who will be facing a challenging SCI life journey. They have gifted hope for a positive future.

A gift left to us in a will is not a spur of the moment decision. It is – or at least I would hope it is – a well thought out choice that has been discussed with whānau and a solicitor.

It is settled on after loved ones have been cared for, and can take many different forms: a set amount, a percentage of what is left after family gifts are made, a piece of art, shares, a life insurance policy.

In a world where many of us are asset rich and cash poor, two percent of the residual estate can easily be the most significant gift a person will make to charity. Whether it is \$5,000 or \$500,000 – a gift in your will to NZST is an investment in hope and positive futures.

If you have ever considered leaving a gift in your will, whether to NZST or another charity close to your heart, I encourage you to action that thought.

Long after you’re gone, your legacy of hope will live on.

If you’d like information on leaving a gift in your will and would like to chat about how a gift would support NZST or you have already committed to leaving NZST a gift please call me or our fundraiser, Su Marshall, on 03 383 6881.

We’d love to have a chat over a cuppa. ☺☺

A few facts about wills:



A recent survey from Perpetual Guardian showed around **20 percent of people were planning to leave a charitable gift in their will**, and five percent had already made provision for gifts.

Leaving a gift in your will doesn’t necessarily mean making a whole new will – very often it can just be added to an existing document (a codicil).



Your will should be kept in a safe place, known and accessible to your executor. You must have a hard copy, with no staple marks or indentations.

A Commission for Financial Capability (Retirement Commission) survey in 2018 found **only 47 percent of New Zealanders had a will**.



Anyone over 18 with personal assets (including Kiwisaver) totalling \$15,000 or more should have a will. If you die without one (‘intestate’), the law dictates how your assets will be divided.

It’s recommended you update your will whenever your personal circumstances change - marriage, divorce, children, buying a house, terminal illness diagnosis, etc. Some situations will automatically void your will.



If you are considering leaving a gift in your will to a charity close to your heart, **always ensure your whānau and loved ones are cared for first.** It’s also a good idea to talk your ideas through with them so they understand your reasons.

How to make a will? It’s best to see your solicitor or a trustee company (e.g. Public Trust, Perpetual Guardian etc.) to help ensure it is legally correct, and to protect it from being challenged.



There are also several online options to help you create a will (e.g. LawHawk, Footprint, etc.). The cost of creating a will can vary widely depending on its complexity (starting from around \$60) but it’s a worthwhile investment to ensure your wishes are known and carried out.

“Ultimately, in our last moments, we want our thoughts to be peaceful, happy and reflective, and to feel secure that our will has everything sorted for the people we’re leaving behind. It’s an act of love, made in advance,” says former Retirement Commissioner Diane Maxwell.