

Leaving a bequest: suggested wording

If you do not have a will, the guide below will help your lawyer to incorporate a bequest clause in your planned will.

If you already have a will, the guide below will help your lawyer to prepare a codicil to reflect any changes you would like to make.

The following is the suggested wording (delete as appropriate):

'I give and bequeath to the Trustees of the Victoria University of Wellington Foundation Incorporated:

the residue of my estate

OR _____% of my residuary estate

OR the sum of \$ _____

OR other assets _____

as an untied gift OR for the principal purpose of: _____

If, at any time, the Trustees of the Victoria University of Wellington Foundation, in their absolute discretion, consider that no person or project may be a suitable recipient, then the Trustees may apply the bequest towards any project in sympathy with the principal purpose. (Optional and only to be included where a principal purpose has been specified.)

I instruct that my preference is that the interest income should be allotted to the objectives of this bequest, but the Trustees of the Victoria University of Wellington Foundation may resort to capital if they, in their absolute discretion, think this is appropriate.' (Optional)

If you have made provision in your will for Victoria University, or are planning to make a bequest, please do let us know so that we can thank you personally for your generosity and keep you up to date with developments at the University and the Foundation.

For further information:

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