

Making a Will

To begin with

Things to be aware of when making a will

- ▶ **What happens if you die without a will?** Depending on the value of your estate, your assets may be divided among family members you may not have wanted to recognise, and in shares that may be inappropriate. In some circumstances the government could receive all or part of your assets.
- ▶ **How to make a will.** The law says it must be made in a certain way. You can get your legal advisor (lawyer or trustee company) to help you, or do it yourself.
- ▶ **Marriage automatically cancels a will** (unless your existing will specifically provides otherwise) and you will need to make a new one.
- ▶ **Divorce automatically cancels gifts in favour of the former spouse** and appointment of the former spouse as an executor (unless the will specifically provides otherwise) and you may need to make another one.
- ▶ **If you are in a relationship** – including marriage, de facto and same-sex relationships – your partner may have rights which need to be considered, or you may have shared property.

While you are there

Here are some questions you can ask your solicitor or trustee when you are preparing or altering your will

- ▶ Who is a suitable person for me to appoint as executor?
- ▶ How can I make sure my young children are looked after properly if I die?
- ▶ Who should I name as beneficiaries?
- ▶ Have I adequately provided for all people who are financially dependent on me or to whom I may owe a moral obligation (and who therefore may be able to challenge my will)?

Preparation

When you visit your legal advisor there are some things you can prepare ahead. Here are some items you can list ready to take with you:

- ▶ A general list of your assets and where they are held (cash, investments, property loans you have made, insurance policies)
- ▶ Name and address of any person you would like to be responsible for your estate after you die (your legal advisor can help with this if you don't know who to suggest)
- ▶ Details of any special gifts you would like to make to particular individuals
- ▶ Names and addresses of people or organisations you wish to receive specific gifts from your will
- ▶ Names and addresses of people or organisations you wish to receive what is left after all special gifts have been made (the residue of your estate)
- ▶ Details of who you wish to appoint as guardian of your children.

Follow-up

There are some things your family should know before you die so they are able to carry out your wishes. Let them know details about:

- ▶ Who your legal advisor is
- ▶ Who the executor of your will is
- ▶ Where the original of your will is held
- ▶ Whether you would like to be buried or cremated
- ▶ If you are an organ donor.

Words to use

"I give to the New Zealand Historic Places Trust Pouhere Taonga (here you specify the gift such as: the residue of my estate OR a portion of the residue of my estate OR the sum of \$....) for the general purposes of the New Zealand Historic Places Trust (or you can name a specific purpose) and I declare that the official receipt of the New Zealand Historic Places Trust shall be sufficient discharge for my Trustee."



*Legacies are a precious source of income for the New Zealand Historic Places Trust
From our earliest days, legacies have made a difference to our work*

We welcome enquiries from everyone interested in making a lasting contribution to New Zealand's heritage.

If you would like to arrange a bequest or make a donation, please contact:

Funding Development Manager
New Zealand Historic Places Trust
Antrim House, 63 Boulcott Street,
PO Box 2629, Wellington 6140

Email: information@historic.org.nz
Phone: (04) 472 4341

www.historic.org.nz

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New Zealand
Historic Places Trust *Pouhere Taonga*

WILLS & BEQUESTS



*Your bequest is
a wonderful way to help preserve
New Zealand's heritage*



How Wills & Bequests Help

Every sum, no matter how small, is welcomed!

You might consider giving

- a specified sum of money or piece of property (a specified gift)
- a share of the remainder of your estate after you've made provision for specified gifts and family
- all the remainder of your estate after you've made provision for specified gifts and family.

Photos

front cover:
Antrim House, Wellington,
(Grant Sheehan)

back cover:
Silver mirror, Highwic, Auckland (NZHPT)

this page:
clockwise from top left: Hurworth,
New Plymouth (Touch Design)

School programme at Pompallier Mission,
Russell (NZHPT)

Matanaka Farm Buildings, Waikouaiti
(Andrew McMillan)

Exterior detail, Alberton, Auckland
(Sydney Struwig)

"First ride on a penny-farthing" Totara
Estate, Oamaru (John Lamb)

Interior detail, Alberton, Auckland
(Sydney Struwig)

background graphic both pages:
Lippincott, R.A., Auckland University
College Arts Building (mosaic floor),
Lippincott Collection, LP2, Architecture
Archive, University of Auckland Library

A BEQUEST CAN HELP OUR WORK!

By making provision in your will for the New Zealand Historic Places Trust Pouhere Taonga you can support our work and provide a lasting gift for our nation's heritage – a gift that will last forever. Every gift counts, every bequest means something more we can do to preserve our heritage for the benefit of present and future generations.

Some of our most significant sites – among them Kemp House in Kerikeri (New Zealand's oldest existing building), Alberton in Auckland and Fyffe House in Kaikoura – have been gifted or bequeathed to NZHPT.

Bequests to NZHPT can be

- ▶ Gift of money
- ▶ Gift of property and real estate to keep or to sell
- ▶ Gift of historic objects and artefacts.

Bequest of money

You don't need to have a lot of money to leave a bequest. Anyone can leave a bequest to NZHPT and we welcome all gifts, large or small.

Money from bequests has been particularly valuable to NZHPT for maintaining and interpreting our heritage properties and for maintaining our collection of historic objects and precious items relating to our properties.

Bequest of property or real estate

The NZHPT accepts gifts of real estate and property. Gifts of property can be made at any time (before or after death) and our donee status with IRD means they won't incur gift duty or estate duty.

We do need to ensure that resources will be available to successfully maintain, interpret and operate the property, together with any associated heritage collections, well into the future, so please contact us first to discuss a bequest of property.

Please ring the Funding Development Manager on (04) 472 4341 to discuss it first, or write to the Funding Development Manager, NZHPT, PO Box 2629 Wellington, email information@historic.org.nz

Bequest of historic objects

The NZHPT is interested in acquiring items that once belonged to any of the properties that it cares for. We also may acquire items that are directly relevant to the history illustrated by a particular property or to people associated with it.

If you would like to bequeath or donate an item associated with one of our properties, please contact the Funding Development Manager on (04) 472 4341 to discuss it first.



HOW OUR WORK ASSISTS HERITAGE IDENTIFICATION

- ▶ Since 1955, we have collected and stored New Zealand's heritage information
- ▶ Maintaining the NZHPT Register of historic places, historic areas, wāhi tapu and wāhi tapu areas is one of our statutory obligations
- ▶ We undertake thematic studies, such as New Zealand's Modern Movement architecture
- ▶ We make the information useful and available – using the internet and other means so that external organisations and the public can access it
- ▶ We gather precious heritage information before it is lost forever. Loss from earthquake, fire, coastal erosion or development can't always be prevented, but we can help by recording it using photographic surveys, architectural drawings and archaeological surveys prior to destruction at heritage sites.

HOW OUR WORK ENSURES HERITAGE SURVIVAL

- ▶ We work with owners to protect and conserve heritage values
- ▶ Our advocacy work and the archaeological authority process protect significant heritage wherever possible
- ▶ Our staff work to ensure heritage places continue to be economically viable with advice, information and support to individuals, owners, heritage professionals, local bodies, and councils
- ▶ NZHPT seeks to support whānau, hapū and iwi to manage and protect their heritage places, working directly with them on conservation, and developing resources and workshop programmes that build the capability of Māori communities to ensure the survival of heritage places.