

SUGGESTED WORDING To SHOW YOUR ADVISOR

CODICIL

THIS IS A CODICIL to the last Will of me [insert name, town of residence, occupation] which Will bears date the day of

*I GIVE AND BEQUEATH free of all duties the sum of [insert amount in words and figures or percentage of estate or assets as specified] to THE WAGNER NEW ZEALAND FOUNDATION, for its general purposes, AND I DECLARE that the receipt of any Trustee or other responsible officer of the said Foundation shall be a full and sufficient discharge to my trustees.
IN all other respects I CONFIRM my Will.*

MEMORANDUM OF WISHES

To: The Trustees of [Name of family trust] ("Trust") created by Deed dated the [insert date] made between [insert names]

It is my/our wish that on the death of the survivor of us the remaining Trustees of the Trust give effect to my/our wish that a gift of \$ [insert amount or percentage of assets or particular assets] is made to THE WAGNER NEW ZEALAND FOUNDATION for general purposes, for which the receipt of an authorised officer of the Foundation shall be a full and sufficient discharge to the Trustees.

THE WAGNER NEW ZEALAND FOUNDATION (COMMITTEE MEMBERS AS AT 1 SEPTEMBER 2011)

PETER ROWE (CHAIRMAN)
SIR MICHAEL HARDIE BOYS
HEATHER SIMPSON
HEATH LEES
TERENCE DENNIS



The Wagner
New Zealand
Foundation

LOOKING TO SUPPORT A REALLY GOOD CAUSE?

When the times comes to review your Will, why not consider a bequest to support the work of The Wagner New Zealand Foundation?

WHAT IS THE WAGNER NEW ZEALAND FOUNDATION?

The Wagner New Zealand Foundation is a charitable trust established by The Wagner Society of New Zealand Incorporated. The Society has approximately 400 members sharing a common interest in the life, works and influence of Richard Wagner (1813-1883), conductor, critic, designer, writer, inventor of music drama, and composer of some of the greatest music ever written.

Over a number of years the Society has gone from strength to strength boasting branches in Auckland, Wellington, Christchurch and Dunedin. Each of these branches runs programmes of recitals, social events, and talks by international and national speakers. The Society organises tours to international Wagner productions, group bookings to national events and each year, receives and allocates tickets for the Wagner Festival in Bayreuth, Germany. In addition Newsletters are sent to members during the year informing members of Wagner events and news from around the world.



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The APO concert performance of Das Rheingold (above) and Simon O'Neill's recording, Father and Son, (below left)

Through The Wagner New Zealand Foundation, whose aims are to deepen and extend the understanding of Wagner, the Society provides financial support for Wagner events in New Zealand and supports New Zealand artists who wish to further their study of the composer's work abroad. To date the Society and Foundation have provided support for Simon O'Neill's recording with the NZSO, *Father & Son*, awarded a grant to Margaret Medlyn to study in Europe and supported a special concert performance of *Das Rheingold* in Auckland. Other projects are continually under review.

WHY MAKE A BEQUEST TO THE WAGNER NEW ZEALAND FOUNDATION?

By making a bequest to The Wagner New Zealand Foundation you will be not only helping to support the work of the Society in the promotion and study of the life and work of Richard Wagner, but also providing support for performances of Wagner's work and assistance for New Zealand artists who wish to study his work.

HOW TO MAKE A BEQUEST

Please fill out the form opposite and either contact Peter Rowe at the address opposite or consult with your lawyer. Wording for a bequest by way of a codicil amending your will, or a direction to your family trust is included overleaf. Further information, if required, can be sought from the Foundation.

A BEQUEST

- ☐ YES, I would like to make a bequest to The Wagner New Zealand Foundation

Name:

Address:

..... Telephone:

The best time to contact me is:.....

- ☐ I would like a representative of the Foundation to contact me to discuss gift possibilities
- ☐ I have already made a bequest to the Foundation in my will or in a memorandum to my family trust.
- ☐ I have named the Foundation as a beneficiary of my life insurance policy

In making or revising your will, it is important that you consult with your legal advisor. Suggested wording to consider and to show to your advisor is shown overleaf.

Please note if you wish to leave a specified percentage of your estate, or the residue of your estate after all provisions have been met, or specific assets, or a bequest for a specific activity, your legal advisor will provide you with the correct wording.

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