



MONTE CECILIA

Housing Homeless Families



MAKING A BEQUEST TO MONTE CECILIA

ABOUT MONTE CECILIA

For more than 38 years Monte Cecilia Housing Trust has been a voice for housing justice, delivering a wide range of housing-related services to hundreds of families every year.

Monte Cecilia Housing Trust delivers a wide range of housing related services which either address immediate housing and associated needs, or raise public awareness and influence government policy on housing justice issues.

Staff actively encourage and nurture the resourcefulness, independence and resilience of families facing considerable and often overwhelming challenges. We work with families to identify particular needs and set goals aimed at strengthening families to realise their hopes for the future.

Families can access the range of services offered by Monte Cecilia to enable them to achieve their goals and/or may be supported to seek assistance from other relevant agencies or service providers. Monte Cecilia operates an open-door approach, enabling families to return for follow-up advice, advocacy assistance, or support once they have secured transitional or permanent housing.

Monte Cecilia monitors and evaluates its work on a regular basis, actively gathering data and other information to ensure consistent, high quality service delivery and informed housing advice to families, the public and the government.



Monte Cecilia is engaged in networking with other transitional housing providers, community agencies and other organisations to share information, exchange skills and knowledge, enable access to a circle of resources, and inform government policy.

Monte Cecilia actively participates in the regional and national policy arenas, calling attention to and raising awareness about housing justice issues, connecting local concerns to public issues, and seeking to influence the development of properly informed policy advice. Monte Cecilia participates in and offers leadership to housing action groups and also works collaboratively with like-minded organisations to develop innovative responses to housing needs.

WHAT IS A BEQUEST?

In the event of your death, the things you own, such as vehicles, houses, investments, furniture, personal objects and monetary assets, all form your “estate”. If you do not have a Will outlining how you would like these assets to be distributed then they will be distributed in accordance with New Zealand law. This may result in your estate not going where you would have wanted it to.

A bequest is a gift made as part of your Will (or trust). A bequest can be to a person or organisation, trust or foundation. Anyone can make a bequest—in any amount—to an individual or charity.

WHY MAKE A BEQUEST TO MONTE CECILIA?

A bequest to Monte Cecilia Housing Trust is a chance to leave a legacy of hope, helping to ensure that everyone has access to adequate, affordable and secure housing.

By leaving a bequest to Monte Cecilia, you help ensure that we have the means to provide homes and assistance to thousands of men, women and children every year.



HOW TO MAKE A BEQUEST

There are rules surrounding how a will should be prepared and executed. It is important that these rules are followed or some of the wishes expressed in your Will may not be able to be fulfilled, so to set up a bequest you should talk to your solicitor or trustee company.

If you do not have a Will, speak to your solicitor or trustee company today to prepare one.

Please note that Wills can be changed at any time and should be reviewed periodically, as your circumstances

may have changed – family members may be added or removed, financial situations change, you may change your mind regarding who you wish to see benefit from your estate.

Changing your Will doesn't require changing the entire document. It is possible to add a single clause, such as adding the Monte Cecilia Housing Trust as a beneficiary by adding a "codicil" (an addition or supplement that explains, modifies, or revokes part/all of a will).

WHAT SHOULD I PUT IN MY WILL?

When writing your will, it is important to name the person you want as executor to carry out your stated wishes.

You should consider all the items you own and the debts you may owe, the net amount of which is your estate. From this, consider what individuals or organisations you would like to benefit from your estate.

Something to remember, however, is that if you do not make adequate provision for relatives and dependents, they may apply to the court for greater benefits from your estate. Your solicitor or trustee company can advise you on this.





TYPES OF BEQUEST

There are several types of bequest you may wish to consider when making one to the Monte Cecilia Housing Trust.

Specific bequest: A gift of a particular item of property, such as clothing, furniture, property, etc. to go to a specific person or organisation.

General bequest: This is usually a sum of money or a percentage of the value of your estate given to a particular person or organisation.

Residual bequest: This is how you want the remainder of your estate dealt with after specific and general bequests have been given. For example, after gifts are given to family members (specific bequests) and sums of money given out, a residual bequest would divide whatever remains amongst your chosen list of organisations.

When it comes to giving to Monte Cecilia, there are a number of ways you can do this:

- You can give a specific amount of money.
- You can provide a percentage of your estate.
- You can donate specific items you own.
- You can take out a life insurance policy on your own life with a portion of the proceeds going to Monte Cecilia.
- You can make a bequest that takes effect after the death of your spouse, with your spouse having your estate for as long as they live, then the indicated portion going to Monte Cecilia.
- You can make a bequest through a perpetual trust that will provide ongoing financial support over time.

WORDING TO USE

You can find one example of the wording you can use when making a bequest to Monte Cecilia Housing Trust in you will below. However, your solicitor or trustee can advise you further.

Should you wish to make a bequest for a specific purpose, please consult Monte Cecilia.

“I give free of all duties to the Monte Cecilia Housing Trust [the sum of (\$specific)] or [the residue of my estate] or [(specify)] % of the residue of my estate or [my (specify item)] to be used and applied for general purposes.”



TERMS USED

There is specific terminology used in relation to wills. Here are a few commonly used terms and what they mean:

Administrator: Somebody appointed by law to settle your affairs if you die without leaving a Will, or if the person named as executor of your Will does not act.

Beneficiary: Someone who is left a gift in your Will.

Bequest: A gift in your Will.

Codicil: A change or addition made to an existing Will.

Estate: The total of what you leave when you die.

Executor: The person appointed in your will to see your wishes and instructions carried out.

Intestacy: The name given to the situation when someone dies without leaving a valid Will.

Partial Intestacy: When someone's will does not dispose of the entirety of their estate.

Probate: The legal procedure to validate a Will.

Residue: What is left of your estate after all expenses have been paid and specific/general gifts given out.

Testator (male)/Textatrix (female): The person who made the Will.

Will: A Will is a written instruction on how a person's property is to be distributed on that person's death. To be effective it must comply with correct legal procedures.

LETTING US KNOW YOU WISH TO MAKE A BEQUEST

Please fill out the fields below and send it to the Monte Cecilia Housing Trust to advise us about your plans regarding continuing your support of Monte Cecilia through your Will.

Monte Cecilia Housing Trust's postal address is:

30 Windrush Close
Mangere
Auckland 2022

First name: _____ Surname: _____

Address: _____

Phone number: _____

Email address: _____

Details of your bequest: _____

Alternately, you can email us at info@montececilia.org.nz or call us on 0800 624 848.



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MONTE CECILIA HOUSING TRUST

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