

Named Endowment Fund

Memorandum of Wishes

I/We wish to establish a Named Endowment Fund with the Top of the South Community Foundation ("Foundation"), a registered charitable trust (CC34345) under the Charities Act 2005.

In doing this I/we recognise that this Fund is not a separate trust or sub trust. I/We confirm that what is expressed below is simply an expression of my/our wishes and is not legally binding on the Trustees of the Foundation.

Full name and address:		
Phone: ()	Tobile:	
Email:	DOB:DOB:	
Name of Fund:		
	elect EITHER (i) OR (ii) OR a combination of both (i) and (ii)	
(i)% is to be distributed to any charitable pu Marlborough (delete area if appropriate) area at the di	. , ,	
(ii)		
Ongoing liaison: The Foundation will provide ongoing li	iaison as follows	
While I am/either of us are living: An annual written report telling how much was distributed and to whom (if appropriate).	When I/both of us have died: An annual written report to my/our executors (or anyone nominated by them) telling them how much was distributed and to whom, for as long as they want to receive this.	
General		
I/we confirm that provision for this Fund has been made in my will/our will and/or Trust documentation.	that year, whether that be income from the fund or whether it be topped up by capital. Where I/we have specified a particular	
I/We acknowledge that my/our intention as to who the beneficiaries are to be may change in the future.	beneficiary, if in the judgment of the Trustees of the Foundation that beneficiary ceases to meet the legal tests of being a charitable purpose with tax exempt status, I/we ask that the Foundation distribute what would have gone to that beneficiary to another charitable beneficiary (or beneficiaries) which has purposes and objectives similar to those of the intended beneficiary as at	
I/We therefore reserve the right to notify you from time to time of any such changes.		
I/We reserve the right to change the name of the Fund if I/we wish.		
When using the expression "the Nelson Tasman / Marlborough area" I/we mean the area within the jurisdiction of the Nelson City Council, Tasman District Council and the Marlborough District Council (or their successors).	the time of this application. If in the judgment of the Trustees of the Foundation, circumstances have so changed since the establishment of the Fund that strict compliance with this Memorandum is	
We acknowledge that where I/we have made reference to the distribution of income, this refers to however much of the Fund that the Trustees of the Foundation decide to distribute	undesirable, impractical or impossible, I/we agree that the Trustees may direct the distributions from the Fund to such charitable purpose as they think best, taking into account my/own wishes given the changed circumstances.	

Although the Foundation accounting record for the Fund, all of the Funds ad Foundation may be pooled	ne amount in the Fund I Iministered by the varied	ion is set at 1% of the capital in the put I/we acknowledge that this may be from time to time by the Trustees of the lation.	
Establishment Donation —	- Tourie		
towards the operating exper continue to build the profile	nses of the Foundation, allowing it to a e of the Foundation and encourage other ement donations allow the Foundation	de-off establishment donation which goes dminister their fund in the first instance, er potential donors to set up a fund. In to continue the daily work of the Top of	
This donation may qualify fo	or a 33.3% tax credit.		
I/We agree to pay the estab	lishment donation of \$5,000 by the fol	lowing method (please tick applicable box):	
Upon the establishment A cheque is enclosed: (a	of this fund. account number for internet banking i	s 03-1354-0601182-00)	
or \$1000 annually for the n	ext five years: (account number for ir	ternet banking is 03-1354-0601182-00)	
or At the time the Top of the South Community Foundation receives the funds.			
Authorisation for Name Di	isclosure		
The Top of the South Comm encourage supports among		le to list its donors in various ways, to	
	, , , , , , , , , , , , , , , , , , , ,	I we will only list names where we have	
appreciate this can be a very been given authority to do so situation.	o. Obviousty there will hever be any di	scussion relating to the individual's illiancial	
been given authority to do so situation.	o. Obviously there will hever be any dis	•	
been given authority to do so situation. Yes, I am happy for my/o		•	
been given authority to do so situation. Yes, I am happy for my/o	our name(s) to be listed in various adve	•	
been given authority to do so situation. Yes, I am happy for my/o	our name(s) to be listed in various adve	•	
been given authority to do so situation. Yes, I am happy for my/o	our name(s) to be listed in various adve	•	