

Methodist Church of New Zealand
Te Hāhi Weteriana o Aotearoa

Administration Division
P O Box 931
CHRISTCHURCH

Information Leaflet No. 156

May 2015

WHERE THERE'S A WILL . . .
THERE'S A WAY



**of continuing to give lovingly
after the end of your life**



The Methodist Church of New Zealand



31 May 2015

Kia Ora,

This booklet on 'deferred giving' has been prepared by the Administration Division in consultation with Divisions, Groups and individuals throughout the Connexion.

It sets out the ways in which you can make bequests or form trusts during your lifetime enabling your money and your service to work together.

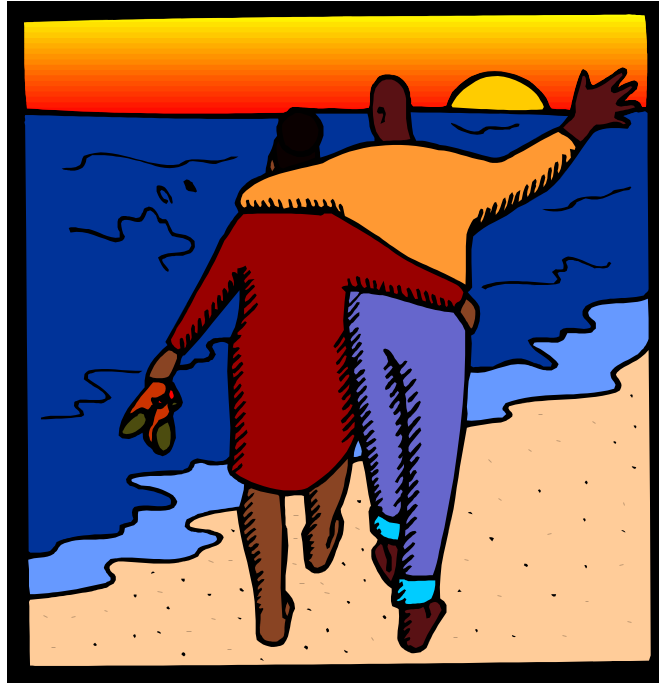
It offers guidance to assist you in making your Will so that

- *your vision is wide*
- *your intentions are clearly stated and express your real wishes*
- *your wishes can be carried out.*

As always, you should seek independent legal advice to ensure that your intention and wishes are documented in such a way so there is no confusion.

You may obtain further information from:

*General Secretary
Methodist Church of New Zealand
P O Box 931
CHRISTCHURCH*



*A generous heart
and a wide vision*

A generous heart and a wide vision

The offering you give each week is a constant challenge to faith and an opportunity to give generously to the work of the Church.

But your giving does not need to stop when your earthly life ends.

There are ways you can continue to give financial support after you die, but careful thought and planning are needed if you are to give in ways that meet your wishes and are best for the Church.

This booklet sets out to

- * Show the scope of the Church's work and to indicate areas where your gifts would be of great benefit.
- * Offer practical guidance as to how you can ensure that your wishes are carried out.

[You might like to take the booklet with you when you make or revise your will.]

Consider some of the exciting possibilities

- ✧ The Church is involved in many different and varied projects for people. We are amazed when we see the caring ways in which the Church seeks to proclaim the Gospel and to meet wide varieties of human need. We can continue to share in this work with our gifts of money or property.

- ✧ All can share in the ongoing work of the Church, for gifts both large and small are appreciated and honoured.

- ✧ Your gift would be a continuation of your own life long interest in such areas as social services, education, training for the ministry, church property, communications-media, church camps, overseas missions.

- ✧ Please make your gift as general as possible. The most helpful bequest is one that is made to the Methodist Church of New Zealand for the “general social, educational and charitable purposes of the Church” either locally or New Zealand wide. Very specific gifts sometimes cause problems as needs change and what seems so pressing today may cease to exist tomorrow.

- ✧ A general gift or one without rigid conditions is an expression of faith in the Church of the future. It is saying “let us trust the Church of the future as those in the past have trusted us. We know our gift will be used where it is most needed.”

When making a will

If your wishes are to become a reality they need to be recorded in a Will. To help you think about this task we offer these thoughts for your guidance.

- ✧ If you die without a will the administration of your estate will take longer and be more costly. Your property may not be distributed in the way you intended. Even if you do not wish to make provision of a gift to the church, we strongly encourage you to have a will prepared.
- ✧ A will needs to be carefully prepared and properly executed. This requires professional advice and guidance which is available from your solicitor.
- ✧ Remember the responsibilities you may have to others, particularly your family. Do they need your help or can they make their own way in life?
- ✧ Your will needs to be kept up to date. Changing circumstances, including changes in legislation may mean that a Will becomes out of date. Some changes of status, such as marriage or dissolution of marriage automatically revoke a Will.
- ✧ While you may know what you want to say it has to be written down in language which is legally correct. In this booklet there are some suggested forms of wording that you can show to your lawyer. The General Secretary of the Church at the Connexional Office, P.O. Box 931, Christchurch will be happy to assist you or your lawyer with any such wording.
- ✧ One of the major decisions you have to make is to decide what form your gift will take. Here are the possibilities. You may:

Make a Bequest

Set up a Trust in your Will

Set up a Trust in your lifetime

Make funds available by loan.

Provide for a lifetime interest in your Estate, then a Bequest.

- ✧ The following paragraphs set out to explain what is involved in these various ways of giving.

Making a Bequest

✧ **FOR A SPECIFIC PURPOSE AND/OR LOCAL CHURCH OR PLACE WITHIN THE METHODIST CHURCH OF NEW ZEALAND:**

I give and bequeath unto the Methodist Church of New Zealand and direct that the receipt of the General Secretary or Financial Services Manager of the said Church shall be a good and sufficient discharge to my Trustees,

(Specify amount or property to be left)

and I express the wish

OR

I direct

That the said (monies or property) be used (both capital and interest)

(Specify purpose such as Local Church, area or place, Synod, Trust or Fund)

This form of bequest covers the problem which can arise if a Trust is created for a specific purpose, and then the passage of time changes that need. It expresses your wish without imposing a legally binding Trust, and so enables flexibility to give the most benefit to the Church from your bequest.

An alternative wish or direction could also be expressed. For example, if you wished to leave some money to a particular “Methodist Mission”, but by the time you die this institution no longer existed, you could say “or for some similar work in social services carried out by the Church” (in New Zealand or a local area).

✧ **FOR A GENERAL BEQUEST TO THE METHODIST CHURCH OF NEW ZEALAND:**

I give and bequeath unto the Methodist Church of New Zealand for the general purposes of such Church and I direct that the receipt of the General Secretary or Financial Services Manager of the said Church shall be a good and sufficient discharge to my Trustees.

(Specify amount or property to be left and, if desired, the following may be added)

and I express the wish

Setting up a Trust in your Will

If you wish, the capital gift to remain intact, with only the income being used, or if your intention is to spread the benefit of your gift over a number of years, it may be worth considering leaving your gift to the General Purposes Trust Board. The General Purposes Trust Board was established by the Conference to act as a holding Trustee to meet such wishes, and today significant sums are administered by this Fund, something over two million dollars.

The amount of the bequest will be invested in a way that protects as far as possible the capital from the effects of inflation (usually in property) and the income from the investment will be paid to your desired purpose each year.

However, it should be noted that there are costs associated with this and therefore the Church recommends that this is only used when larger sums are to be set up within a Trust.

✧ **The suggested wording for a bequest setting up such a Trust is:**

I give and bequeath unto the General Purposes Trust Board of the Methodist Church of New Zealand

(Specify amount or property to be left)

to hold the same upon Trust and to invest the same or the proceeds of sale thereof in any investment fund authorised by the Conference of the Methodist Church of New Zealand for the investment of similar monies and to pay the net annual income derived from such investments for the benefit of the

(Specify purpose such as Local Church, area or place, Synod, Trust or Fund)

Provided that the said General Purposes Trust Board may deduct from the income earned an administration fee of up to five per cent per annum thereof and that the General Purposes Trust Board may transfer from the income to the capital of the Trust Fund each year such amount as may, in its absolute discretion, be prudent to protect the future earnings of the Fund.

Provision has been made in this form of bequest for the transfer of income to the capital sum, so increasing the amount deposited with a corresponding increase in income. When there is a high level of inflation it has been found necessary to try and protect the long-term value of long-term bequests and the ability to increase the capital sum in this manner has proved helpful. At the present time often 20% of income is returned to capital, which may mean that the intended beneficiary of the income may not receive as much as the benefactor hopes, but the earning capacity of the gift is protected.

Setting up a Trust in Your Will

If funds are available during your life-time, a Trust can be formed by a Deed or Trust. The preparation of the Deed is similar in many respects to a Will and legal advice and assistance is necessary.

By this means the donor can see the benefits of foresight and generosity acting through the life of the Church. Income to approved and registered Trusts for charitable purposes is, at the present time, tax free.

A Trust can be formed with a small sum and added to during the years. It is possible, without difficulty, for the income from the Trust Fund to be still available to the donor(s) during their life time.

Setting up a Trust Fund may be a way of funding some pioneering new development in the life of the Church. This is already the Church's experience.

Winstone, Walters, Le Brun, Bradley and Kingswood are some of the Trusts that have been set up within the General Purposes Trust of the Church.

The General Secretary of the Church will be happy to discuss any of these possibilities in detail.

Where Your Gift May Be Used

There is a wide choice of projects to which your gift may be made. The following survey is offered to give you a picture of various aspects of the Church's work. Perhaps the list may suggest an area which you would not otherwise have thought about.



They are:

1. The local church.
2. Social Services.
4. The wider Church.
5. Trusts and other bodies with the wider Church.
6. Church Funds.

1. THE LOCAL CHURCH

There are aspects of support of your local church would could benefit from a bequest. These include –

- some provision to meet new and special needs for the benefit of people within the local Church.
- some provision for the ongoing maintenance or development of property.

Remember that the local possibilities and needs could be overlooked.

2. SOCIAL SERVICES

The social services of the Methodist Church of New Zealand are divided into four areas, each with a Superintendent and Board situated in Auckland, Wellington, Christchurch and Dunedin. A wide range of services is provided. There are also Social Services in Hamilton and Palmerston North, as well as Sinoti Samoa and Vahefonua Missions.

Services include:

Aged Care – Homes, hospitals, flats and day care. These services which are run, either by Methodist Social Services or in a limited number of case, in conjunction with other church agencies, are located in Auckland, Hamilton, New Plymouth, Wellington, Christchurch and Timaru.

Child Care – Preventative social work through qualified social workers for families at risk. Foster care and the provision of a number of family homes. Day care services.

Counselling Services – Face to face counselling and telephone counselling.

Social & Community Work – community development work. Social case work and relief services, work amongst families at risk and the unemployed, including work skills programmes. This work is done on behalf of the whole Church and is available to all in the community who are in need. Most of it is located in the cities and in provincial towns. Additional information may be obtained from:

Auckland area: The Superintendent, PO Box 5104, Wellesley Street Auckland 1141

Hamilton area: The Superintendent, PO Box 1388, Hamilton 3240

Palmerston North area: The Superintendent, PO Box 1887, Palmerston North Central, Palmerston North 4440

Wellington area: The Superintendent, PO Box 9932, Marion Square, Wellington 6141

Christchurch area:	The Superintendent, PO Box 5416, Papanui, Christchurch 8542
Dunedin area:	The Superintendent, PO Box 2391, Dunedin 9044
Sinoti Samoa:	The Superintendent, C/- 57 Crompton Crescent, Taita, Lower Hutt 5011
Vahefonua:	The Superintendent, Private Bag 11903, Ellerslie, Auckland 1542

3. THE WIDER CHURCH

Mission & Ecumenical Committee

The overseas partnership mission work of the Methodist Church is carried out through the Mission & Ecumenical Board. Through this Board, the relationship with our traditional areas of interest is maintained, e.g. Solomon Islands, Papua New Guinea, Samoa and Tonga.

Financial support/grants to the overseas mission of the Church are offered to the overseas churches in several ways:

- * to independent autonomous churches overseas to help fund their training of ministers and laity.
- * to churches to pay salaries of overseas workers sent from New Zealand.
- * for capital works.
- * for specific developmental projects.
- * to bring people to New Zealand for training purposes.
- * for obtaining education in the person's own country.

Mission Resourcing

Mission Resourcing is charged by the Conference to give leadership and financial support in the Church's mission in New Zealand.

- * To maintain ministry in vital rural and urban areas.
- * To develop ministry in new residential areas.

- * To encourage Parishes to explore new strategies for outreach.
- * To foster co-operation with other negotiating Churches.
- * To provide support for multi-cultural ministry for Samoan, Tongan and Fijian people resident in New Zealand.
- * To enable congregations to develop an effective programme for evangelism.
- * To provide hospital chaplaincies.

Te Taha Maori

- * “Every member a Minister” is practised as Minita a Iwi, Kai Karakia and lay people, work alongside the full-time Ministers in each of the Parishes.
- * Seminars, organised by Taha Maori provide training and encouragement for all workers.
- * Centres are provided and are of great importance in the total work of the Parishes.
- * Hostels have for many years provided accommodation for young people during their time of training.
- * The Maori response to the Gospel receives strong emphasis and is of great importance.

Trinity Theological College

- * Prepares men and women for the ordained ministry both in College, and in home-setting training.
- * Provides opportunities for continuing education of the ministry.
- * Enables lay training courses and facilities to be provided.
- * Seeks to guide and resource a broad range of educational opportunities in local congregations, children, youth, adults, inter-generational activities.
- * Assists with leadership development through such events as Lay Preachers and Lay Training Courses, worship and training weekends and group courses.

4. TRUSTS AND OTHER BODIES WITH THE WIDER CHURCH

Particulars and details can be sought from the respective secretaries, whose address can be obtained from the Connexional Office, P O Box 931, Christchurch. This list is not exhaustive.

The James & Martha Trounson Benevolent Fund Trust Board

Incorporated in 1928, with a capital gift of eleven thousand pounds.

Social Welfare legislation has ameliorated many former social and economic problems, but there are still needs not met through the welfare system.

The Trust makes grants to members in need.

Wellington Methodist Charitable & Educational Endowments Trust

The Board of the Wellington Methodist Charitable & Educational Endowments, established by Act of Parliament, uses its income for the benefit, maintenance or education of young persons in New Zealand, and within this framework substantial grants are made each year towards family care programmes and other programmes working with young people.

Wesley College Trust Board

The Wesley College Trust Board provides a Christian based boarding school education for Maori, Polynesian and European students in the name of the Methodist Church. The College, a Year 7 to 13 school in a rural setting at Paerata, Auckland is integrated. Substantial assistance from hostel fees is given by the Trust to enable young people to receive their education at the College.

5. CHURCH FUNDS

Methodist Women's Fellowship

Each year a special area of need is selected and Women's Fellowship throughout the country raise funds for this particular objective.

Fellowships also give financial support to an educational and medical fund which is distributed to areas of need with overseas partner churches.

Assistance for Retired Ministers – Widows

The Supernumerary Benevolent Fund provides grants to supplement the annuities of Supernumeraries, or widows of ministers, and helps meet specially deserving needs.

New Church Buildings

The Church Building and Loan Fund provides loan finance to local churches to assist them in the erection of churches and other buildings. These loan funds as repaid are lent out again and again.

Presbyters', Deacons' & Layworkers' Loans

Provides loan funds, primarily to assist in the purchase of motor vehicles for those in ministry.

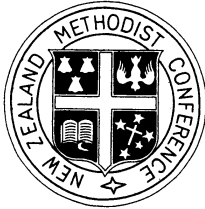
Communications

To explore ways of communicating and proclaiming the Christian faith and its application to life today through all available media, e.g. television, radio, drama, the written and spoken word.

(We believe that in this area lies perhaps one of the greatest challenges to our Church today.)

<p>NOTE: A bequests for any of these purposes can be made to the Methodist Church of New Zealand for (indicate purpose).</p>
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The Methodist Church of New Zealand



In conclusion

The reading of the booklet may well have caused you to pause and reflect. May be it has given you a panoramic picture of your own life, and the things you hold dear.

You have contemplated the future – as indeed we all must – and have asked yourself questions about what are important dreams and hopes to be fulfilled.

The establishing of a bequest, by a trust, or by a will, can be a profound Christian experience: “a grain of wheat, sown for a new harvest”.

Be assured that family, friends and the Church will acknowledge with gratitude and thanksgiving your generous heart and your wide vision.

