



## *Your Legacy of Faith*

A GUIDE TO LEAVING A GIFT IN YOUR WILL



Catholic Diocese of Auckland  
Te Taumata o te Hahi Katorika



Dear Brothers and Sisters in Christ,

As we journey together in faith, I am inspired by the enduring spirit of our community. The Catholic Diocese of Auckland has been built on the dedication and generosity of those who came before us, and it is this legacy that we have the privilege to uphold.

Our forebears faced many challenges, yet their unwavering faith laid the foundations for the vibrant community we enjoy today. They built our churches and founded our schools, creating spaces where we can worship and grow in faith. Their sacrifices have given us a precious gift that continues to bless us.

Today, we have the opportunity to ensure this gift is passed on to future generations. By considering a gift in your will to the Diocese, you can help sustain and grow the mission of our Church. Your generosity can support training future priests, caring for our clergy, enhancing Catholic education, and maintaining our beloved parishes.

Your consideration of leaving a gift in your will is a powerful testament to your faith and love for the Church. It ensures that the work of Jesus continues to flourish in our community. No matter the size, your gift will be a beacon of hope for future generations.

Thank you for contemplating this meaningful way to support our Diocese. May God bless you abundantly for your kindness and foresight.

Yours sincerely in Christ the Good Shepherd,

+ Steve Lowe

+ Steve Lowe  
Bishop of Auckland



## The Essence of Gifts in Wills

Gifts in Wills, often referred to as bequests, represent a special form of giving that creates a lasting impact. This thoughtful gesture allows you to leave a meaningful legacy.

A gift in your Will can be of any magnitude and need not be monetary. Through your Will, you have the autonomy to decide how your generosity is distributed, ensuring your values and wishes are honoured.

Choosing to include a gift in your Will is a profound and personal decision. It reflects the people, causes, and values closest to your heart. This act of giving allows you to continue supporting the Catholic Diocese of Auckland ministries that have been meaningful to you, even after your life's journey concludes.

A gift in your Will empowers you to create a lasting difference, reflecting your life's passions and priorities. The gift ensures that the institutions and causes you care about continue to thrive, inspired by your enduring commitment.



# How your gift can have impact

Deciding to leave a gift to the Catholic Diocese of Auckland is a meaningful way to support the Diocese and wider faith community. Whether you choose to leave property, shares, cash, or a percentage of your estate, your contribution will make a lasting impact on future generations. Here are some ways you can specify how your gift could be intended used:

## General Purposes

If you prefer your gift to be used where it is most needed, a donation for 'general purposes' will maximise its impact. Under the directive of the Bishop of Auckland this could include training seminarians, social assistance, Catholic education, clergy support, parish needs, or other essential services.

## Supporting my Parish

A Gift in your Will to your parish can contribute to the upkeep of the church buildings, ensuring they remain sacred and welcoming spaces for prayer, reflection, and celebration of the sacraments. It can help preserve the beauty and integrity of these places of worship, ensuring they continue to serve as spiritual homes for your family and community. Beyond maintaining the physical church, your gift can provide vital funding for parish ministries and outreach programmes. It can support youth initiatives that nurture the faith of future generations, assist with pastoral care for those in need, and strengthen community outreach efforts that reflect the Church's mission of love and service. By remembering your parish in your Will, you help protect its future, enabling it to continue its mission of faith, hope, and charity. Your legacy will be one of enduring generosity, ensuring that the work of the Church flourishes long after your lifetime.

## More ways you can support the Diocese

- Training of Seminarians
- Cathedral of St Patrick and St Joseph
- Pro-Life Advocacy
- Catholic Education
- Youth and Tertiary Chaplaincy
- Care and Support of Clergy
- Relieving Poverty and Outreach
- Marriage and Family
- Māori Pastoral Care
- Deaf Ministries
- Overseas Aid
- And many more...

# Planning Checklist

When preparing your Will, it's important to decide who your beneficiaries will be (family, friends, and charities), how your assets will be divided, and the amount or proportion each will receive. Keeping a checklist ensures that everything is in order when the time comes to prepare your Will according to your wishes.

Here is a personal checklist you may find useful for your legacy planning:

☐ **Discuss Plans with Your Solicitor**

Talk through your plans and any concerns with your solicitor.

☐ **List Your Assets**

Make a list of your assets and their approximate values.

☐ **Identify Major Debts or Liabilities**

List any significant debts or liabilities, such as mortgages or loans.

☐ **Choose an Executor**

Carefully consider whom to assign as your executor (a non-beneficiary) and discuss this with them before drafting your Will.

☐ **Provide for Loved Ones**

Ensure you make adequate provisions for your loved ones and dependents.

☐ **List Your Gifts**

Keep a list of the gifts you wish to include in your Will.

☐ **Detail Beneficiaries**

List the full names and addresses of the people and organisations you wish to benefit from your assets.

☐ **Specify the Type of Gift**

Determine what type of gift you wish to leave each beneficiary in your Will.

☐ **Sign and Attest Your Will**

Have your Will signed and attested by two witnesses who are over the age of 18 and are not beneficiaries of your Will.

☐ **Inform Your Executor**

Advise your executor of the location of the original Will and provide them with a copy.



Your Will is a significant legal document. To include a gift in your Will to the Roman Catholic Diocese of Auckland, it is essential that your solicitor uses the appropriate terminology. We suggest the following clause for your Will:

*I give the sum of \$.... [Specify a particular sum of money, a specific asset or assets, a percentage of your estate, or the residuary estate after distributions are made] to the Roman Catholic Bishop of Auckland (Charity No. CC29112) for its general purposes [for the purposes of (specify purpose)].  
I direct the receipt of any responsible officer of the Society to be a full discharge to my trustees.*

\*Examples to consider include:

- Support for the Parish of...
- See *impact* (page 4) for more examples

**I declare that in respect of any legacy or residuary gift by this will given to any charitable, educational or benevolent body or institution the receipt of the secretary treasurer or other proper officer of that body or institution shall be a full discharge to my trustees for that legacy or residuary gift and my trustees shall not be bound to see to the application of it.**

**I further declare that if at my death [or at the date of distribution of my residuary estate] any charity named in my will does not exist or has amalgamated with another charity or has changed its name such legacy or residuary gift shall not fail but my trustees shall pay it to the charitable organisation which they consider most nearly fulfills the objects intended to benefit. The decisions of my trustees in this regard shall be final and binding.**

We encourage you to let us know if you decide to leave a gift to the Catholic Diocese of Auckland in your Will. This will allow us to thank you for your generosity and better understand how you hope your gift will make a difference. Please know that your Will is personal and private, and we will honour your wishes in how we communicate with you.



# Bequests in Action

Bequests are a powerful way to support the Church's mission for generations to come.

## Every Gift Matters

Even the smallest bequests can make a meaningful difference. A recent \$10,000 gift was used to support key diocesan initiatives. Sustaining the Church's mission across the Catholic Diocese of Auckland. Whether large or small, each bequest strengthens the Diocese's ability to provide pastoral care, faith formation, and education.

## Training Future Priests

A generous bequest established an endowment fund, now valued at \$1.7 million, to support the ongoing formation of priests in Auckland. This enduring gift ensures that seminarians receive the necessary education and training to serve the Church and its communities for generations to come.

By investing in the future of the priesthood, this bequest plays a vital role in fostering vocations, strengthening parish leadership, and sustaining the spiritual life of the Diocese.

## Ruth E. Miller Estate

The late Miss Ruth Miller left a generous bequest of \$1.3 million to the Bishop of Auckland, specifying that it be used "for the general purposes of the Diocese as the Bishop of Auckland sees fit."

Bishop Pat Dunn, who knew Ruth well and admired her passion for education, expressed a desire to support theology students through scholarships. He noted that many young people are interested in theological studies and that financial assistance could encourage more to pursue this path.

As a result, the estate now funds annual scholarships, with \$25,000 distributed annually.

*"My faith has guided me throughout my life, and I want to give back to the Church that has given me so much. Leaving a gift in my Will is my way of ensuring future generations can continue to grow in faith."*

— Bequest donor

## Your legacy can strengthen the Church's future.

Contact us to learn more. [giving@cda.org.nz](mailto:giving@cda.org.nz)

This brochure is designed to give you general information about leaving a gift in your Will to the Catholic Diocese of Auckland. Before making a gift in your Will to the Diocese, we recommend seeking professional legal advice

The Roman Catholic Diocese of Auckland Ecclesiastical Goods Trust is a registered charity (CC29112).

This report has been printed on an environmentally responsible paper, produced using Third Party 100% Post Consumer Recycled, Process Chlorine Free (PCF) pulp from Responsible Sources.