



FICINO SCHOOL BEQUEST SOCIETY

An Invitation to Invest in Our Future



FICINO
SCHOOL



Peter Crompton
Ficino School Principal

Ficino School was established in 1997 with seven students and is now almost at capacity with waiting lists for many classes.

The unique philosophy of the school aims to harness and develop the power of attention in our students. In an age where there is a serious attention deficit in young people, our students are beacons of light in the way they conduct themselves, their ability to adapt to new situations and their diligence and success across our broad curriculum.

The school now needs to grow and develop, so that more students can connect with the many gifts a Ficino Education offers. Uplifting surroundings and some exciting new building projects are the next step to growing Ficino School into an outstanding centre of learning.



Bruce Watson
Ficino School Board Chairman

“As custodians of this incredible education, we have a collective responsibility to maintain its legacy.”

Your bequest will assist us greatly and help ensure our students are taught by the very best teachers in the very best environment.



Imagine a Gift that can Transform the Lives of our Students and our School

To remember Ficino School through a bequest is a way to make a permanent statement and a lasting difference to Ficino for generations to come.

Making a bequest is perhaps the most personal commitment you can make. It gives the satisfaction of knowing that you are part of an important legacy. Never underestimate the importance of making a bequest, whether small or large, your gift will make a huge difference. It is the school's responsibility to meet the challenges in the future as successfully as they have met those of the past. Legacy gifts allows the school to plan for the long term and offers donors the chance to make larger gifts that might not otherwise be possible during their lifetime.

Education is the investment our generation makes in the future. A bequest is more than a promise that you will leave a gift to Ficino School in your Will. It is an affirmation from you to future generations that you are invested in our students, our staff and our school.

By making a gift, you will have an enduring visible imprint on the future of Ficino School. An individual's life-span is limited, but Ficino will endure for countless generations and your bequest ensures that adequate provision is made for our students and facilities in the future.

Our Commitment to You

- The Ficino Educational Foundation, a charitable trust registered with the NZ Charities Commission (CC43389) will independently administer all bequests on behalf of Ficino School. The Foundation Trustees take their fiduciary responsibilities very seriously and understand their duty of care to you as a bequestor.
- Through your gift we will ensure that your name lives on as a legacy of Ficino School.
- We will always respect your privacy. We recognise and appreciate that your Will is personal to you. We will handle whatever gift you leave us with care, sensitivity and respect.
- Donors may not choose to tell us about gifts in their Will, but if you do tell us, we will respect your wishes in terms of how we contact and talk to you in the future.
- As a bequestor you can indicate where your bequest is to be used and we will honour your wishes.



Membership of the Ficino School Bequest Society

The Ficino School Bequest Society is the school's bequest program and membership of the Society makes it possible for you to be recognised and honoured during your lifetime, as well as acknowledging the significant role bequests will play in the future of the school.

A bequest costs nothing now yet provides you with the satisfaction of knowing that you have provided for the school in the future.

Membership of the Ficino School Bequest Society is open to all those who pledge to make a bequest to the Ficino Educational Foundation in their Wills regardless of the amount.

The Society will recognise and honour your generous bequest in a number of ways, including invitations to school events in particular the annual Society luncheon which will allow members to keep up-to-date with the school's program and hear about future plans. The event also provides an opportunity for the school to recognise the generosity of its members and thank them as well as meeting other potential supporters.

Making a Gift in Your Will

A Will is very personal and we strongly advise you to consult your legal advisor before drafting a new Will or updating an existing one by way of a codicil.

We are always happy to discuss your wishes and intentions without offering direct legal or financial advice on Wills or estate planning.

Donors can determine if their bequest is to be restricted for specific purposes where they designate their gift to a specific project or unrestricted for general school use where Ficino determines the best use of the gift.

The common types of legacies with which donors can support are:

- **A Residuary Gift** which is a gift of all or part of the value of the donor's estate after debts and other legalities have been met
- **A Pecuniary Gift** where a donor can choose to leave a sum of money
- **A Special Gift** where a donor can choose to leave a property, stocks or shares or gifts of personal/household effects

If you are considering including a gift to Ficino Educational Foundation in your Will, the following is some suggested wording to ensure your wishes are carried out:

"I hereby give and bequeath to the Ficino Educational Foundation, a charitable trust registered with the NZ Charities Commission (CC43389)

\$ (amount in words)

or % (a specific percentage) of my estate

or % (the whole or a specific percentage) of the residue of my estate

or (describe precisely the item of property)

free from all duties and charges, as a contribution to the Ficino Educational Foundation to be applied to (specific purpose to which you may wish to direct your gift) or for the (general purpose of Ficino School) and I hereby declare that the signature of the designated officer of the Ficino Educational Foundation shall be sufficient discharge to my executor/s for this bequest"

Honouring Your Intentions

In addition to your Will, you may choose to draw up a "Statement of Intention" which will represent the collaborative efforts of you the donor and the Ficino Educational Foundation. This will provide a balance between achieving your objectives and supporting programs and projects of ongoing importance to the school.



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Ficino Educational Foundation Bequest Pledge Form

On the understanding that the appropriate value and description of my bequest may be altered at any time should circumstances necessitate, I am pleased to advise that I have made the following bequest to the Ficino Educational Foundation in my Will.

I wish my bequest to be directed towards:

☐ Restricted purposes: (Describe the specific purpose/s of how the bequest is to be allocated)

☐ Unrestricted purposes: (To be determined by the Ficino School Educational Foundation)

Donor's Contact Details:

Name:

Address:

Phone:

Email:

Name of Donor's Lawyer:

Name:

Address:

Phone:

Email:

Donor's Signature:

Date:



Please return this completed Bequest pledge form to:

Ficino School, 27 Esplanade Road, Mt Eden, Auckland 1024

Or for further information contact:

Roisin Lamb

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& Communications Director
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ficino.school.nz