

A Guideline for Donations and Bequests to Quakers in Aotearoa New Zealand

Part 1-Making a Donation or a Bequest

Donations impact our work for a peaceful, sustainable world, with a just society for all. We welcome support for Quaker concerns and activities both locally and internationally. There are international Quaker bodies supporting peace, justice and Quaker unity. In Aotearoa New Zealand there are local and national activities in support of Quaker spiritual development and our concerns about peace, social justice and the environment. The Religious Society of Friends is open to everyone and does not set membership fees, annual subscriptions or tithe. Members and Attenders support the work of our Society by giving voluntary service and donations according to our ability. For each of us, our financial state and other demands on us will vary from time to time in our lives.

If you are considering making a donation or bequest, whether for general use or a specific purpose, to your local meeting or the larger body of Friends, consulting with us will be helpful since together we may discern where and how to best use your gift. Your local meeting's clerk or Pastoral Care committee may be a helpful first contact for more detailed information.

Members or Attenders wishing more information about how to financially support Quaker concerns and activities in their local meeting

If you wish to contribute financially, talk to your Monthly Meeting's Treasurer about how to make a one off or regular donation. The most convenient method for making a **regular donation** is by direct credit to the Monthly Meeting's bank account. If you wish, a receipt will be issued each year which may entitle you to claim a tax rebate.

Making a Donation to support a specific purpose and/or a specific YM fund

Thank you for considering making a gift to Quakers in Aotearoa New Zealand for a specific purpose; a gift which can be used and make a difference during your lifetime, and perhaps beyond.

You may wish to donate to Yearly Meeting, the main body of Friends. There are several Yearly Meeting funds to which you could donate. These include the Testimonies Fund, Quaker Peace and Service ANZ, Quaker Education Fund and Friends Mutual Assistance Fund.

Or you might wish to make a specific purpose donation to your local Meeting or Worship Group.

Consulting with other Friends will be especially important since together we will be able to discern where and how to best use your gift. Here are some ideas to consider-

- Is it for the general work of a committee or other body, or is there a clear statement of the specific purpose the donation is to be used for?
- Does the purpose fit with Quaker Testimonies?
- Is there an identified concern? Does it need clarifying or further discernment? Would a *Clearness Committee be helpful to assist with your discernment?
- What if the original purpose changes over time or the committee holding the money is laid down? What if we can no longer discuss your donation with you? Please consider making your donation as flexible as possible so that it can be used in a timely manner.

See The Quaker Handbook (on the quakers.nz website) for more information on Clearness Committees

Making a Bequest

Thank you for considering leaving Quakers a bequest, a donation that will be made after you have died. It would be helpful if you make your wishes clear in your Will. We suggest you review the **Making a Donation** section as well. As with a donation, consulting your local meeting clerk and/or Spiritual & Pastoral Care Committee might be helpful as you plan.

We strongly encourage you to consult a lawyer to obtain qualified legal advice about the types of legacy gift you might make, and especially about the specific wording of your bequest.

Many of the Quaker funds in Aotearoa New Zealand are held by the Religious Society of Friends Aotearoa New Zealand Trust Board (the Trust Board) and are administered by committees who carry out the discernment process for each fund.

It is important for the execution of your will that you are careful to use the full correct legal name of the body you wish to receive the gift. For most Quaker funds, the name of the receiving body will be:

The Religious Society of Friends Aotearoa New Zealand Trust Board

If your bequest is wholly or partly for a Quaker fund that is not held by the Trust Board, that portion will be transferred to the nominated charity. As with other types of donation, a bequest can be made for a specific purpose or for general use within the Religious Society of Friends.

Here are some suggestions where you might direct your gift:

The Religious Society of Friends Aotearoa New Zealand Trust Board (the Trust Board) holds the following funds:

- Friends Mutual Assistance Fund of the Yearly Meeting of Aotearoa New Zealand
- Meeting House Building Fund of the Yearly Meeting of Aotearoa New Zealand
- Quaker Education Fund of the Yearly Meeting of Aotearoa New Zealand
- Testimonies Fund of the Yearly Meeting of Aotearoa New Zealand
- General Purposes Fund of the Religious Society of Friends Aotearoa New Zealand Trust Board

Other Quaker Charities

- Quaker Peace and Service Trust
- A specific Monthly Meeting of the Religious Society of Friends Aotearoa New Zealand (or its successor in title) (If you wish to gift to a specific Worship Group, make this known in your instructions, but please make provision for changes of circumstance as suggested below).
- Whanganui Educational Settlement Trust ("WEST") of the Religious Society of Friends (Quakers) in Aotearoa NZ

We are delighted to receive legacies for particular use, however, times and needs change and this can sometimes make the use of a bequest problematic. If you are considering a bequest for a specific purpose ask yourself-

- Does the purpose fit with the Quaker Testimonies?
- If the original purpose changes over time and is no longer needed, how would I want my gift used?

We strongly suggest that a bequest contains words such as-

'if it is not practicable to use the bequest for the stated purpose, it may be used for the general purposes of the Religious Society of Friends (Quakers) in Aotearoa New Zealand (or a specified body)'

For more information, refer to the leaflet "Leaving a Legacy" published by the Trust Board, see the specific funds on the quakers.nz website, in the Quaker Handbook, (also on this website) or contact the committee administering the funds

Part 2- Suggested procedure for Friends working with a donor or considering bequests made to their group

If you are a Quaker committee, Monthly Meeting or other Quaker body considering accepting a donation-

Clarify with the donor-

- Has the purpose of the donation been discussed with the donor?
- Does the purpose of the donation fit with Quaker Testimonies e.g. does meeting *this* purpose impact on our carbon footprint?
- Is the purpose practical and achievable, has long term flexibility been discussed?
- Would this funding support your group's aims, activities and priorities?
- What process will be used to achieve the purpose? (How will the concern be addressed?) What assistance will be needed?
- **Clarify within your group-**
- Has agreement been reached on how the funds will be held and administered and how allocation decisions will be made?
 - Who will hold the funds?
 - Who will administer the funds?
 - How will decisions be made on allocation of the funds?
- Is there a risk that accepting this donation could dominate the work of the group and/or other groups, adversely impacting the implementation of other projects and priorities?
- How will spiritual support be provided to those undertaking the work required?

If you are a Quaker committee, Monthly Meeting or other Quaker body which has been offered a bequest for a specific purpose, there is no alternative 'use for general purposes' clause, and it is no longer possible to use it as it is written,

- You may need to discuss the bequest with the executors of the will to clarify-
 - If and how it fits with Quaker Testimonies,
 - If it can be interpreted to be used in a way that aligns with the donor's intent,
 - As a last resort, to determine if it can be used at all. In a few cases we might need to decline a bequest.
- You might consult The Trust Board and Standing Committee for their perspective and discernment.