



Guidelines

1. This will clause or codicil is to be used where a person has an existing will and wishes to leave a specific figure as a legacy to the Dunedin Symphony Orchestra.
2. If in doubt, contact your solicitor to prepare a codicil or will as may be appropriate.
3. Contact your solicitor to verify that there is no conflict between the stipulations in this will clause or codicil and other stipulations in your will.
4. Name details on the codicil must be the same as in the original will.
5. The codicil document should be signed by the testator in the presence of two adults who must witness the testator's signature. The witnesses must not be related to the testator, the executor and/or the beneficiaries under the testator's will.

Please complete the will clause or codicil document and send it to your solicitor. Thank you for making this special commitment to the Dunedin Symphony Orchestra.



How do I make a donation to the Foundation?

- Deposit directly to The Foundation for the Dunedin Civic Orchestra 06-0942-0685883-00
- or
- Send a cheque in the name of The Foundation for the Dunedin Civic Orchestra to PO Box 5571, Moray Place, Dunedin 9058

The Foundation is a registered Charity CC 22696.



Contact Us

PO Box 5571
Moray Place
Dunedin 9058

Phone (03) 477 5623
office@dso.org.nz
www.dso.org.nz



BEQUESTS to the DSO

Leave a gift in your will — the ultimate in giving! Help the DSO grow and thrive in the future of our fair city.



Dear Orchestra Supporter,

The Dunedin Symphony Orchestra is trying to raise \$6,000,000 over 20 years to ensure its long-term survival. We depend heavily on grants from organisations such as Creative New Zealand, the Dunedin City Council and the Otago Community Trust. However, funding is not guaranteed and if we should lose any of these grants, then the future of the orchestra would be in jeopardy.

Interest earned from accumulated funds in our trust account will be used to create scholarships, promote musical education and fund extra concert activities.

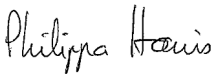
Our aim is to keep the capital intact, if possible, and only use Foundation earnings to supplement or replace grants and other financial resources that may cease.

The Foundation for the Dunedin Civic Orchestra (CC 26969) was established in 1994 with the objective of accumulating and holding reserves in trust for the Orchestra, and to ensure its long-term viability.

You can help the DSO by including a bequest to the Foundation in your will. It is an easy way to create a lasting legacy of music for future generations. Your bequest, be it modest or substantial, will be sincerely appreciated.

Our solicitor has prepared a pro-forma will clause and codicil for your last will and testament, either of which you could use for the purpose. Please contact me (manager@dso.org.nz) if you need further information. We thank you so much for your wonderful support of the Orchestra, and of classical music in Dunedin and Otago.

Best wishes,



Philippa Harris
General Manager



Will Clause

I GIVE free of all charges and estate duty the sum of

.....
*dollars (\$) (or) % of the residue of my estate to **The Foundation for the Dunedin Civic Orchestra**, Dunedin, New Zealand for the general purposes of the Charity (registration number CC 22696). The official receipt of the Charity shall be full and sufficient discharge to my Executor in respect of such payment.*

– OR –

Codicil

I
(Name)
of
.....
(Address)
.....
(Occupation)

(‘the Testator’) DECLARES this to be a first/second Codicil to my last Will, dated the

..... day of 20..... (‘my Will’).

MY WILL shall be construed and take effect as if it contained the following clause:

I give free of all charges and estate duty the sum of

.....
*dollars (\$) (or) % of the residue of my estate to **The Foundation for the Dunedin Civic Orchestra**,*

Dunedin, New Zealand for the general purposes of the Charity (registration number CC 22696). The official receipt of the Charity shall be full and sufficient discharge to my Executor in respect of such payment.

IN ALL other respects I confirm my Will.

EXECUTED this day of 20.....

SIGNED by)
in our presence and attested by us in)
his/her presence)

(Signature of the Testator)

FIRST WITNESS

Name
Signature
Address
.....
Occupation

SECOND WITNESS

Name
Signature
Address
.....
Occupation