



Cancer  
Society

Te Kāhui Matepukupuku  
o Aotearoa

# The Davis Carr Domain Lodge Endowment Trust

Securing the long term future of Domain Lodge



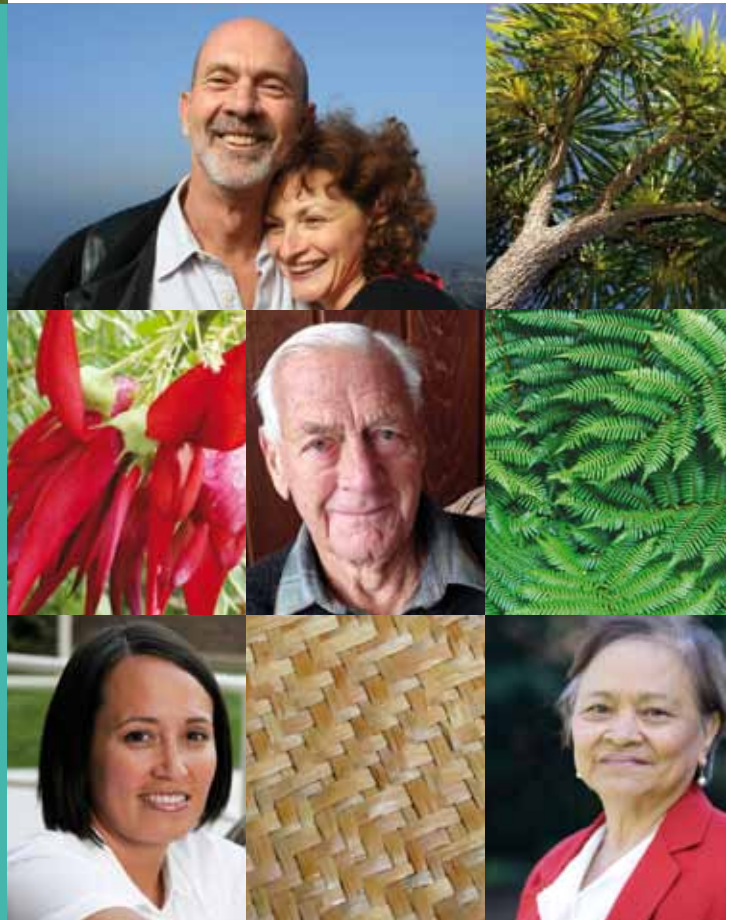


Become a Lifetime Partner - help us build on a legacy of caring for our community.

This year, almost 20,000 people (55 people every day) will be diagnosed with a serious cancer and sadly, around 8,000 people will die from cancer.

There are over 100 different cancer diseases.

The five most common cancer diagnoses are colorectal cancer, prostate cancer, breast cancer, melanoma and lung cancer.



## How does an Endowment work?

Gifts received by the Cancer Society for the specific purpose of endowment are not spent, but rather invested prudently by the Society in perpetuity, as with "The Davis Carr Domain Lodge Endowment Trust".

Gifts in support of endowment enables the benefactor to make an enduring contribution to the charity of their choice and often planning gifts in this way (if their circumstances allow) will provide a charitable taxation benefit.

## What is The Davis Carr Domain Lodge Endowment Trust and why was it formed?

The Davis Carr Domain Lodge Endowment Trust was formed as part of the Cancer Society's commitment to secure the long term future of Domain Lodge, including the core patient support services for which Domain Lodge is the hub. This development also enables the Society to diversify its fundraising income.

In years that the Cancer Society needs additional income for Domain Lodge and its core patient services (other than that raised for annual budget) it will apply to the Trustees of the Endowment Trust for a percentage of the net income derived from this enduring fund.



## How the Society was able to establish an Endowment Fund

In the last quarter of 2007, a joint lead gift of \$2.3 Million was secured by two valued benefactors; Sir Ernest Davis Endowment Trust and Ted & Mollie Carr Endowment Trust. (As of November 2009 the Society has received \$1,150,000 with the balance being pledged over the next five years)

## Acknowledging the Benefactors

The Cancer Society is sincerely grateful to these two visionary benefactors for the enduring support they have awarded the Society and we are thrilled the Endowment Fund carries their name.

The Cancer Society has also been fortunate to be able to invest a total of \$5 million into The Davis Carr Domain Lodge Endowment Trust in 2008 which represents planned gifts (bequest income) received from a number of visionary donors in recent years.

The Society has confirmed further commitments from two valued supporters by way of planned gift commitments.



Sir Ernest Davis (pictured) was Chairman of the Cancer Society Auckland from 1935 - 1948 and his daughter Mollie Carr (and her husband Ted) also shared a genuine interest in the work of the Society. Through their Trusts, these visionary donors were also major supporters of the Domain Lodge Re-development project which was completed in 1999 (they donated \$1.5 million dollars to this project).

## Structure

Whilst The Davis Carr Domain Lodge Endowment Trust is a separate organisation, its financial results are consolidated with those of the Society because the Society appoints the majority of its Trustees.

## Trustees

The Board of The Davis Carr Domain Lodge Endowment Trust comprises of six Trustees. Five Trustees are appointed by the Cancer Society Auckland Division and the sixth Trustee is appointed by the Trustee of the Sir Ernest Davis Endowment Trust (New Zealand Guardian Trust).

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### Mr B W Stevenson

(Convenor) B.Com, ACA

### Mr Chris Blincoe

NZGT Financial Advisor (Fund Manager & Custodial Trustee)

### Mr G N K Brown

B. Com, ACA

### Mr G J Clatworthy

Graduate of Harvard Business School, Immediate Past President, Cancer Society Auckland 2006 - 2009, Board Member 1988 - 2009

### Mr Murray MacCormick

MB ChB FRACs (President of the Cancer Society Auckland Division)

### Mrs Leah Watson

QSM, BA, BC, CMINZ, CA (ICANZ), CFP, TEP

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## Enduring support

Thanks to prudent guardianship by the Trustees of The Davis Carr Domain Lodge Endowment Trust, this enduring fund continues to grow and (at the discretion of the Trustees) it is able to return a portion of the net income to assist the Society with the:

- Annual costs in operating Domain Lodge (fully subsidised accommodation for cancer patients during their active phase of treatment which can extend up to 6 - 8 weeks)
- Core support services which are provided from Domain Lodge free of charge, such as the:
  - Extensive support and information services for people with cancer and their families 0800 CANCER (0800 226 237)
  - Liaison Nursing Service which consists of a team of thirteen (13) registered Nurses experienced in community and oncology nursing who visit to support people in their homes who have had a recent diagnosis (or relapse), who are receiving treatment for cancer
  - Counselling services
  - Transport service to enable cancer patients unable to drive or without transport to get to treatment
  - Meal service for cancer patients



## Fundraising Goal

The initial fundraising goal of this endowment is \$20 million which is the minimum the Society needs to be able to sustain Domain Lodge and its core support services. All benefactors will be awarded enduring naming recognition.

## Gifts for Endowment

Gifts made in support of endowment are typically large donations that have been planned over time and they are usually represented by more than one gifting instrument. E.g. a gift to The Davis Carr Domain Lodge Endowment Trust could consist of a donation pledge paid over time (up to five years) with the balance being planned through a bequest for the purpose of endowment.

## Lifetime Partners

Helping us build on a legacy of caring for our community

Lifetime Partners are visionary supporters and we are privileged to call these people our partners, as it is with their help that our work will continue well into the future.

If you decide to plan a gift to The Davis Carr Domain Lodge Endowment Trust you will become a Lifetime Partner of the Cancer Society Auckland.

Our Lifetime Partner programme allows the Society to recognise and honour this special group during their lifetime while they are able to accept our thanks and appreciation for their generosity. Lifetime Partners are kept up-to-date with the Cancer Society's mission both today and long into the future. The future of our work would not be possible without the extraordinary generosity of our Life Time partners.



Dr John Mayo

"I have been delighted to contribute to the marvellous work of Domain Lodge and the Cancer Society, by planning a gift in support of The Davis Carr Domain Lodge Endowment Trust and at the same time be able to remember Marylyn in this wonderful and appropriate way, which I am certain she herself would really appreciate".



Today the Cancer Society's Domain Lodge provides fully subsidised accommodation for more than 1400 patients from outer Auckland and Northland every year and the Society's liaison nurses alone make more than 5000 visits to support cancer patients in their own homes.

# Gifts for Endowment

1. The Cancer Society's Davis Carr Domain Lodge Endowment Trust will accept the following types of gifts:

- Cash
- Publicly traded securities

2. The Cancer Society's Davis Carr Domain Lodge Endowment Trust will accept the following types of gift commitments:

- Pledges (payable during a period of up to five years)
- Bequests
- Distributions from charitable entities
- Real estate, including life estate agreements (life tenancy)
- Life insurance
- Other assets, including partnership interests, non-publicly traded securities
- Other income producing assets



## Suggested wording for your Will

I give to the Cancer Society of New Zealand Auckland Division Incorporated \_\_\_\_\_ (a percentage (%) of my estate or specific gift) to be applied for the endowment purposes of The Davis Carr Domain Lodge Endowment Trust of the Cancer Society of New Zealand Auckland Division Incorporated. The receipt of the secretary or treasurer shall be full and sufficient discharge to my executors.

The Cancer Society encourages all donors and potential donors to seek independent professional advice on all matters relating to their gift planning, including charitable taxation.



## Background

The Cancer Society was first established in 1929 and it is the leading non-government organisation dedicated to reducing the incidence and impact of cancer in New Zealand.

The Society is proud that it is regarded as one of New Zealand's most trusted charities.

## The Daffodil

The daffodil is the Cancer Society's symbol of hope. In the same way spring brings re-growth and new life, daffodils give hope and new life to all New Zealanders coping with cancer.

## Research



Finding a cure for cancer begins with scientific research. The Cancer Society demonstrates its unwavering commitment to carrying out research into the treatment and causes of cancer, as New Zealand's largest private funder of cancer research.

The Auckland Cancer Society Research Centre, founded in 1956, is internationally recognised for its anti-cancer drug development, and has eight new drugs currently in clinical trial.

## How we help

The Society provides a wide range of services which include fully subsidized accommodation for patients at Domain Lodge in Auckland. Domain Lodge is also the hub for the Society's support and information services which are provided free of charge. These include liaison nursing support, 0800 Cancer Information Helpline, counselling, transport to treatment and meal service.

Other services provided by the Society include health promotion initiatives which are aimed at reducing the incidence of some cancers (e.g. SunSmart, Smokefree and LiveSmart programmes).

## Our mission

Improving community well-being by reducing the incidence and impact of cancer.

**But we can't do it alone.**



## For further information contact

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Improving community well-being by reducing the incidence and impact of cancer.

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Phone 09 437 5593

Fax 09 437 5602

Tollfree 0800 366 066

**Cancer Information Helpline**

0800 CANCER (226 237)

**Cancer Society of NZ Auckland Division Inc.**

Charities Commission registration no. CC22556

**Davis Carr Domain Lodge Endowment Trust**

Charities Commission registration no. CC33967