

Footprint Charity Will Offer FAQs

1. What type of Will does the free-will offer from Footprint provide?

Footprint is a provider of non-advised digital Wills. They are not a law firm or a trustee company and not a substitute for advice from a specialist professional. The footprint platform will ask you some questions before signing up to ensure that the product is right for your situation. If you require an advised Will, Footprint will call you to discuss this further and can provide a referral to Perpetual Guardian at your own cost. Costs will apply for an Estate to be administered.

2. I already have a Will, do I need to make a new Will? How can I update my Will?

Your Will records your wishes at a particular point in time. It is advisable to regularly review your Will so that it accurately reflects your current wishes, as your circumstances could change. To update your Will you can draft a new Will. Once your new Will is signed and verified the new one will supersede your old Will automatically. If you have any questions, check with Footprint or your Solicitor.

3. What happens if I change my mind?

You are free to change your mind at any time about leaving a gift in your Will. To update your Will, you can draft a new Will and once signed and verified the new one will supersede your old Will.

4. Is an online Will as good as one from a lawyer?

Most lawyers use Will templates and populate their customer's information into it. The Footprint platform does the same. The platform was built by lawyers and provides solicitor approved, legally valid Wills and each Will is reviewed by professional Will drafters. There are times when complex situations need a consultation which is why Footprint works with Perpetual Guardian.

5. What if my situation is complex?

If the system identifies that your situation requires a complex Will, you will be referred to their third-party provider Perpetual Guardian for a phone consultation. They will advise of any fee's and charges before you embark on the process with them. You can learn more about their Services, fees and charges [here](#).

6. Do Footprint Wills require Perpetual Guardian to be made executors?

Footprint Wills do not require Perpetual Guardian to be made executor. During the Will creation process, customers have the option to select Perpetual Guardian, a family member/friend or anyone else they choose. If you choose your own executor, you have the option to select Executor Support through Perpetual Guardian or to select them as a back-up executor.

7. Can I leave a gift in my Will to a charity anonymously?

Certainly, when you leave a gift in your Will you will be asked in the 'Declaration' section of the Will builder if you would like to share details of your gift with the charities. If you choose not to share your details with the intending charities, then the charities only receive non-identifiable 'collective data'.

Collective data is the non-identifiable total data that is made up of known and unknown intended gifts i.e number of people that have left a bequest in their Will or a running total of monetary gifts etc. Data is only provided to a charity once it is non-identifiable at an individual level.

8. Will my charity know how much I have left to them in my Will?

Your Will contains private and personal information. Details of a person's intended gift/bequest will only be shared with the charity if the user explicitly agrees to it. It's important to carefully review and understand the terms and conditions provided by Footprint and the charity.

Footprint does not pro-actively reach out to your listed charities to inform them of your intended gift to them. Where permission has been given, charities may receive reporting that would advise them when a gift has been left and the charity can then reach out to you in the future to thank you.

9. Who do I contact if I need any assistance?

You can contact Footprint directly on info@myfootprint.co.nz or 0800 366 877, Monday to Friday 8am to 5pm.