

# Bequest Guide

*Leave behind a smile*



**Thank you for considering leaving a bequest to Anglican Overseas Aid.**

We understand that when making a Will, your family and friends come first. But after making provisions for loved ones, many people decide to leave a gift that reflects their commitment to important charitable causes. We are humbled that you are thinking of us.

In this era of declining government funding, a large proportion of our income comes from the generous donations we receive from people just like you, including gifts left for us in Wills.

We know that there are many things to consider when writing or changing your Will, so we have put together this information to help you.

These pages are intended as a guide only. You should always refer to your solicitor for legal advice.

## Why leave a gift in your Will?

Anglican communities have a strong history of standing firmly with marginalised and oppressed people, regardless of their religious or cultural background, actively providing care and love, and promoting reconciliation and justice in Jesus' name.

With your help, Anglican Overseas Aid has been delivering life-changing programs in Africa, Asia, the Middle East and the Pacific for nearly 30 years. Our programs have helped thousands of people in developing countries access better healthcare, reduce the rates of gender-based violence and build a sustainable future for their families through education, solar lighting, income generation activities and having enough food to eat.

Anglican Overseas Aid also responds to emergencies around the world, arising from both human and natural disasters.



*“For the Revd Alan and Mrs Janet Reid, supporting the Ahli Arab Hospital and breast screening clinic was a matter of living their faith, supporting others and doing what they could to make a difference in a place they shared such wonderful experiences and developed special friendships. Their lives were enriched by their experience and they both continued their support through bequests.”*

- their children, Tom, Rowan, Helen and Angus Reid

*Suhaila Tarazi, Director of the Ahli Arab Hospital, with photos of the late Mrs Janet Reid, whose bequest helped to set up the Hospital's breast screening clinic named in her honour.*

Since our foundation in 1988, together we have achieved great change by supporting our partners to challenge the structures that keep them poor.

We have saved lives in the Occupied Palestinian Territories through our long-term support of the Ahli Arab Hospital through breast cancer treatment, providing clean and safe water and sanitation to rural communities in Mozambique, empowering women in South Africa, and providing solar lights to communities in Vanuatu and Solomon Islands.

We also still have a long-standing partnership with the Afar Pastoralist Development Association that has substantially improved maternal and child health in Ethiopia. This model of community and health development was also successfully implemented with our program partner in Kenya.

These achievements have been possible because of people like you. Anglican Overseas Aid relies on the compassion and generosity of our donors - including those who leave bequests - to continue our vital work for a peaceful and just world for all.

A gift in your Will means so much. It can help us develop our programs around maternal and child health, gender-based violence, and helping families earn a living. It will also allow us to plan for the future, so you can ensure that a voice you trust continues to fight for justice for poor and isolated communities overseas.

You don't have to be wealthy to leave a gift in your Will. We receive gifts of all sizes and each contributes to our life-changing work, no matter how large or small.

## Do I need a Will?

No matter what stage of life you are at, a current, professionally written Will can give you peace of mind. You can rest assured that the people and causes you care about are looked after once you've gone.

If you are an adult resident of Australia who owns property in your name, it is important to make a Will. If you don't have a valid Will, or if your Will isn't up to date, there is a risk that when you die, your assets will not pass to your intended beneficiaries.

As a general rule, a Will should:

- nominate an executor – a person (or people, or trustee company) who will ensure that your last wishes are carried out;
- clearly state who you intend to receive your assets – the beneficiaries; and
- deal with all of your assets – as your Will may be in place for a long time, this is often done by dividing the “residue” (whatever is left after any specific gifts are made). If your life circumstances change, your Will may not appropriately deal with your current situation when you die.

We recommend you consult a solicitor to ensure that your Will is valid and deals with your estate in accordance with your wishes.



*Claudia Roline-Kokona stands in the middle of a lush, green open area near her community. It looks idyllic. But looks can so easily be deceiving. This open green area should be full of the staple crops grown in this part of Vanuatu – water taro, banana, kumala (a sweet potato variety) and more. In March 2015, Cyclone Pam swept through this part of the country, causing widespread destruction throughout Claudia’s community – including destroying all of their crops. But communities are now taking part in disaster preparedness workshops. The workshops are being run by our partner, the Anglican Church of Melanesia, with support from Anglican Overseas Aid and ABM. Photo: Anglican Overseas Aid/David Cook*

## How do I make a bequest to Anglican Overseas Aid?

A bequest can be made in a number of different ways:

- a bequest of your whole estate (or a percentage of it);
- a bequest of the residue (or a percentage of it);
- a bequest of a specified amount of money;
- a bequest of shares or other investments owned by you when you die;
- a bequest of real property (real estate) or other physical property.

Regardless of the form of the gift, we suggest the following wording be included in relation to the bequest:

“I give a bequest of *[insert description]* to Anglican Overseas Aid ABN 39 116 072 050 of 1/165 Victoria Parade, Collingwood, Victoria to use for its general purposes.”

In addition, we recommend that your Will contain the following statement:

"I make this gift with the following directions to my executor:

- a) If Anglican Overseas Aid has ceased to exist or has changed its name or has amalgamated with another organisation, then the gift shall not fail but my executor(s) shall pay it to the organisation in Australia that they consider most nearly fulfils the objects that I intend to benefit; and
- b) The receipt of the Secretary, Treasurer or public officer for the time being of Anglican Overseas Aid shall be sufficient discharge to my executor(s).

You should consult a lawyer to help you draft your bequest to ensure that it can be applied to the purposes that you intend to benefit. Many people prefer to make a residuary bequest because this type of gift keeps pace with inflation over time.

## Next steps? We would love to hear from you

If you have already included us in your Will or you intend to do so, thank you!

If you haven't let us know yet, please do so. By telling us about your bequest, you allow us to acknowledge your gift and contact you to discuss the work that will be possible as a result of it.

***For a confidential and no obligation discussion about planning your bequest giving, please contact our bequest specialist, Sue Riley, at Anglican Overseas Aid.***

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Telephone: (03) 9495 6100 or 1800 249 880