

# 5 steps to leave a gift to CARE Australia in your Will.



# 1.



## **Speak** with family and loved ones

**Your Will is an important expression of the legacy you wish to leave behind. It should bring peace of mind and the confidence that your caring wishes will be fulfilled.**

For this reason, we encourage you to ensure you first make provision for your family and loved ones. With their needs met, you may also wish to help a cause you're passionate about.

If so, now is the perfect time to start a conversation with those closest to you. Share your passion for the life-changing work you make possible through CARE Australia and the impact that a gift in your Will can have — helping women and girls in poor communities break the cycle of poverty, forever.

# 2.



## Decide what kind of gift to leave

**Every gift, no matter the size, makes a difference in the lives of women, families and communities in need. On their behalf, we thank you for considering a gift to CARE Australia.**

There are several kinds of gifts to choose from. If you're unsure how to decide, your solicitor can help discuss the following options with you:

**A residuary gift.** This is the amount that is left after all other gifts and costs have been distributed.

**A percentage gift.** This is a percentage of the value of your estate. Unlike a specific gift, this will not decrease in value over time due to inflation.

**A set amount.** This is a specific amount of money you decide on (also known as a pecuniary gift).

**A specific asset.** This can be property, shares or goods of value.

# 3.



## Engage a legal professional

**While we hope this guide is helpful, it cannot replace valuable legal advice.**

A Will is a binding legal document that ensures your final wishes are carried out as you intended. Whether you're making a Will for the first time or amending an existing one, a legal professional can ensure it's drafted correctly.

If you already have a Will, you can include a gift to CARE Australia by asking your solicitor to add a short legal amendment, called a 'codicil'.

Before you see your solicitor, consider:

**Your assets.** What assets of value do you own?

**Your beneficiaries.** How would you like your assets to be distributed?

**Your executors.** Who would you like to manage your estate and Will?

# 4.



## Include the correct wording

**To ensure your wishes are followed, they must be stated clearly and legally in your Will.** We recommend discussing the wording with your solicitor. Here is an example of suggested wording your solicitor might find helpful:

I give \_\_\_\_\_,  
free of all duties and taxes, to  
**CARE Australia (ABN 46 003 380 890)**  
**of Level 4, 53 Queen Street, Melbourne,**  
**VIC 3000** for its general purposes.  
An authorised receipt from CARE  
Australia will be a sufficient discharge  
for the executor(s) or trustee(s).

Note: In the space at left, insert one  
of the following:

- the whole (or \_\_\_\_\_%) of the residue  
of my estate
- the whole (or \_\_\_\_\_%) of my estate
- the sum of \$ \_\_\_\_\_
- my \_\_\_\_\_.  
(insert name of specific asset(s),  
e.g. property, shares or goods of value.)

# 5.



## Let us know at CARE Australia

**Including a gift to CARE Australia in your Will is a personal choice that you may wish to remain private. But if you choose to share your decision with us, we'd love to get in touch to express our heartfelt thanks.**

As a valued member of the CARE Australia family, we'll send you a small gift of thanks, invitations to special events and regular updates. Knowing

about your generous decision also enables us to better plan for the future.

You can advise us of your decision by contacting our Gifts in Will Team. Your response will be received in strictest confidence.



phone **03 9009 7167**



email **giftsinwills@care.org.au**