

Will

WONDERS
NEVER CEASE.♥



INCLUDE
A CHARITY



DON'T JUST DREAM OF A BETTER WORLD... WILL IT.

Are you *Will*-ing to make a difference?

By leaving a gift in your Will to a cause close to your heart, you'll leave a lasting impact on the lives of others – long after you're gone. A legacy of creating a better world. Who doesn't want to be a part of that?

The human spirit is a powerful thing. We can rise after much adversity and still offer a kind hand to others. This is why the willpower of one makes us all stronger.

And when you choose to leave even a small gift in your Will, the flow-on effect can be exponential. Casting ripples long into the future.

Whether it's medical research, animal welfare, the environment or another worthy cause, your gift will create a brighter future. For generations to come.

Would you like to learn more about the process of leaving a gift in your Will? We're here to support you.

includecharity.com.au



The experts share their insights

'Take your time. Your Will – and leaving a gift – are decisions best made after some space and reflection. The important thing is, don't ignore the concept altogether.' Richard Radcliffe



ROHANI BIXLER
Principal Lawyer | Estate Planning,
Administration & Litigation

Rohani has an extensive legal background in Wills and estates. Since 2006 she's been practising exclusively in the areas of estate planning, deceased estate administration and estate litigation, and disputes.

"A Will gives you – and your loved ones – peace of mind. Estates and inheritances can be a lot to deal with for the people you leave behind. Take your time to get clear on your wishes so we can see them through."



RICHARD RADCLIFFE
Fundraising Consultant

Richard has been a global leader in fundraising for over 30+ years. He has spoken to over 35,000 people about their Wills and wishes. And helps to support both individuals and charities through the bequest process.

"A Will is essentially a love letter to your family which they read after you're gone. So think about what matters to you most and then take this opportunity to articulate it."

Got a question? Let us put your mind at ease

Your legacy isn't something that should be decided on a whim. Or under the stress of a major life event.

Wills are done best when you give yourself the time, space and information you need to make decisions that fulfil your life's wishes.

Why should I consider leaving a gift in my Will?

Richard: Because it's easy. You can add a gift to your Will in minutes. Think about all the things you've wanted to support or achieve in this lifetime. A gift in your Will gives you the opportunity to help such passions come to life, even after you're gone. And the best part is, it doesn't cost you anything now.

Rohani: It's a way of saying thank you for whatever that cause has offered you – or your loved ones – in this lifetime. Charities exist to help those who can't help or advocate for themselves. They make our world better. It's a beautiful thing to support and make a part of your legacy.



How do I choose which charity to support?

Richard: Most people will decide to support a cause that has either impacted them directly or somebody they care about. Or one that aligns with something they would love to see for the world. Perhaps you want to help find a cure for cancer or give food and shelter to the homeless. Whatever it is, your gift will be a part of the process of making it happen.

Rohani: People often decide where their gift will go based on events or organisations that have helped or impacted them. And quality conversations with trusted people can give the individual an opportunity to discuss what it is that they want – and how best to achieve that. Even if the initial chat gets them to the point of deciding on an area they'd like to support, such as the climate or a children's charity. It gives them the foundation to go and make a choice that works for them – and their chosen cause.

How do I tell my family members I've decided to leave a gift in my Will?

Richard: Sensitively, but clearly. I think it helps to make peace with the knowledge that it possibly won't be a fun or comfortable conversation. But it will be a necessary one. Explain to them that you are telling them your wishes because they matter to you – and so does the cause you're choosing to support.



Rohani: I always suggest taking a gentle approach. You could say, 'I know this is hard, but I really need to talk about it.' And give your loved one context. And if possible, share a story about why the charity means so much to you to help them to understand.

How much do most people leave as a gift?

Richard: You can leave as much or as little as you like. There are no rules. (I've seen someone leave \$1 before – although I'd advise against this as it cost the organisation more in administration.) But the point is, a specific gift, large or small, or a percentage of what's left after you've taken care of your family, will be gratefully received. And, more than likely, barely missed by your loved ones.

Rohani: Amounts vary from client to client. It's a very personal choice. But you have a lot of control over what your gift looks like. Some prefer a dollar amount, while others choose a percentage of their estate. The decision is yours and yours alone. The professionals are just here to support you in seeing your wishes through.

Do I tell the charity I'm leaving them a gift?

Richard: Yes! Especially if you'd like to be a part of their community. Most charities love to acknowledge and care for their bequest contributors to say thank you while they can. This act of giving is a big deal – and you should allow them to show their appreciation.

Rohani: From a legal perspective, I would say most definitely yes! Otherwise, the charity may not find out you have left the gift and miss out altogether. It also helps them to further prove your intentions if the gift happens to be disputed by another beneficiary.

Want to amend your existing Will?

To change your Will, you can make an addition called a **codicil**. Your solicitor can help you with this. You should never change your Will by crossing out existing information.

For more advice about creating or changing your Will, head to includeacharity.com.au.

A gift that is immortal: Jill's legacy

'I made sure my loved ones were taken care of. But it was important to me to also leave a gift to an organisation close to my heart.'

I believe life is to be lived

Jill Watson has a colourful life that has spanned many continents. Filled with fine arts, friends and fun – and most importantly, her beloved family.

'It was always top of my mind to ensure I looked after my loved ones. But I also wanted to support the arts because it has given so much to me.'

Jill has always been very forthright with her intentions – and her family was very accepting.

'They knew a majority of my estate would go to family and were happy for me to share a percentage with a cause that has been such a big part of my life.'

I chose something that made my life all the richer

Jill has been involved in amateur dramatics for most of her life. A passion that added much flavour and delight to her journey.

Don't leave your family wondering

Speak to your loved ones about leaving a gift in your Will. Need support to have the conversation?

Head to includeacharity.com.au.



So it was natural for Jill to choose to support others who desire similar experiences.

'I have tailored where my gift goes to so that others have access to the training and experiences I did,' she says.

And I even get to enjoy the benefits now

It's not that we do kind things for glory. Although gifts in Wills are an act of the heroic.

But we humans still like to be shown appreciation. And that is exactly what Jill has discovered.

'I made the specific organisation aware of my parting wishes while I was drafting my Will, so I now get to participate in some of their events throughout the year. And I've been featured in their monthly newsletter.'

So what advice would Jill give to others considering leaving a gift in their Will?

'Sit and think about it carefully. Everyone has different opinions – but think of the things that helped you in your life.'

'And remember, even a small amount can, and will, help a lot.'

Give the gift of a better world

Leaving a gift in your Will means a huge amount to your chosen charitable organisation – and allows you to see through your vision of a better world.

Ready to leave a gift in your Will? Visit includeacharity.com.au or contact the charitable organisation that sent you this booklet.

Ways you can leave a gift:

- **Your entire estate or any percentage you choose.**
- **The remainder of your estate.**
After you have taken care of loved ones, you can leave the whole or part of what remains of your estate.
- **A specific gift in your will.**
You can give a specific amount of money or items such as shares, paintings, or property. However, this does not allow for changes in your circumstances or inflation.
- **A gift through a perpetual trust.**
By making a charitable organisation/s the beneficiary of an endowment fund, you will provide long-term and ongoing support.



TIED GIFTS

You indicate a specific purpose, project or area of work within the organisation that you wish to support.

UNTIED GIFTS

The charity can use your gift for its highest priority at the time of the bequest arrival. These types of gifts are crucial because they allow the organisation to adapt to unexpected needs.

As many charities' priorities can change over time, it's a good idea to talk to an organisation to find out what gifts they prefer.

'If you plan to leave a gift in your Will, it's great to start the conversation with your family as early as possible.'

'That way, your loved ones are aware of your wishes, and there are no surprises. This is helpful both legally – and emotionally.'

Rohani Bixler



**INCLUDE
A CHARITY**

Give a gift to the future – leave a legacy

Reach out to us today to discuss how to leave a gift in your Will.

1300 889 670

includeacharity@fia.org.au

includeacharity.com.au

Fundraising Institute Australia

Suite 2, Level 4,
201 Pacific Highway
St Leonards NSW 2065

Charity Name

Charity Address
Charity Address

Tel:

Email:

charitywebsite.com.au



**Fundraising
Institute
Australia**

The Professional Body for Australian Fundraising