

# How to make a bequest to The Smith Family



Helping disadvantaged Australian children reach their potential through education

everyone's family

A growing number of Australians are seeking to leave a lasting legacy through bequests or charitable trusts.

By including The Smith Family in your Will you will be investing in a brighter future for disadvantaged Australian children and their families and helping us build stronger communities. You will also be sharing our vision of a more caring and cohesive Australian community.

## The importance of your Will

As a written document your Will states clearly how you would like your assets to be distributed. Without a Will you allow decisions about your estate to be made by others. By making and updating your Will you ensure your estate is distributed in the way you intended.

## What can I give?

You can bequeath cash, a specific sum or a percentage or the residue of your estate, jewellery, works of art, shares and other goods. You may wish to discuss with us the type of gift you intend to leave The Smith Family to ensure that we are able to apply it appropriately to our work.

We recommend that where appropriate you discuss your wish to make a gift to The Smith Family with your family or loved ones so that your intentions are clear to all concerned.

## Wording your intention

Including The Smith Family in your Will is simple. The following standard wording can be used or adapted to your requirements in writing a new Will or adding a codicil to your existing Will:

**Where can I get help with making my Will?  
You can approach a solicitor who specialises in drafting wills - your local law society can help you with this – or you can approach the Public Trustees or one of the major Trust companies.**



## **Bequests for general purposes**

'I bequeath to The Smith Family.... (fill in amount of cash, percentage or residue of estate, details of property or shares)... My bequest is to be used for the general purposes of The Smith Family and I declare that the receipt of the Secretary or other proper officer shall be a complete discharge of my bequest.'

## **Bequests for specified purposes**

For bequests for a defined purpose such as support for a specific Community Program (for example *Learning for Life*) or for use within a specific region wording similar to the following is appropriate:

'I bequeath to The Smith Family... (fill in amount of cash, percentage or residue of estate, details of property or shares)... My bequest is to be used to support the *Learning for Life* program. If at the time of my death the program is no longer operating, then my bequest is to be used for the general purposes of The Smith Family. I declare that the receipt of the Secretary or other proper officer shall be a complete discharge of my bequest.'

**For more information about making a bequest contact:**

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