

MELBOURNE
LEGACY



A GIFT OF REMEMBRANCE

WILLS & BEQUESTS



A GIFT OF REMEMBRANCE

We serve our nation and look after the families of the fallen – these are the values that guide Legacy and our supporters.

A Gift of Remembrance can continue the work and ensure your values are honoured into the future. We hope that you'll consider leaving a gift in your will to Melbourne Legacy to help us in caring for the families of veterans who have lost their lives or their health serving their country.

This booklet provides a guide to preparing a will and, after taking care of your family and friends, what you need to consider when leaving a bequest.

Your will is a very important document. It is made to ensure that you can be a continuing support to the people and causes that mean the most to you.

It is highly recommended that it is prepared in consultation with a legal advisor.

We are forever grateful for a gift of remembrance to assist our veterans' families in need.



WHO WILL YOUR BEQUEST BENEFIT?

Your generosity can do so much. A gift in your will is a helping hand to veterans' families. You can contribute to the continuing assistance of those suffering after the injury or death of a spouse or parent, during or after their defence force service. Your support helps us to help Australian families in need, into the future.



YOUNG FAMILIES

Young families and children need special care and support to help them through the loss or ill-health of a spouse, partner or parent. Melbourne Legacy is proud to enrich the lives of children, known as Junior Legatees, by assisting with their education needs and offering them recreational and extra-curricular activities to build self-esteem, learn new skills and make friends with other Legacy kids.



PEOPLE WITH DISABILITIES

Melbourne Legacy supports children and adults with disability of deceased or injured veterans to improve their quality of life, promote independence and encourage social connection. We help to navigate the National Disability Insurance Scheme, access support through local communities and provide advocacy advice and welfare assistance. The rewards of giving our clients with a disability the best opportunity to thrive are immense.



WIDOWS

Legacy helps widows and widowers to receive their entitlements and services, promotes positive ageing and encourages friendship and support networks through events, information sessions and regular activities. Importantly, our care and compassion supports widows through bereavement and gives them hope for a happy and healthy future.

YOU DECIDE — THE REASONS TO HAVE YOUR WILL PREPARED

There are some things we don't get to choose but there are some things we can decide for ourselves. This is why making a will can be such a positive and validating experience. It might be a bit of documentation but it's so worth it to choose for yourself what values you want to see bolstered in the future. Here are the top reasons to get your will in place today.

1. A will is a communication to those you love the most. This document speaks to your personal values, what you have cherished and what you hope for the future.
2. A will protects your family when they need it. They help avoid costs and stresses of the legal difficulties of settling an estate.
3. A will protects your wishes as an individual. It is the one and only method to ensure that what you have is distributed amongst the people and causes you care about. Otherwise, the law will make choices for you.
4. Having a Will also enables you to choose your executor. This is the person who will wind up the affairs of your estate, and you want to make sure you've chosen the right person for you.
5. It can be updated at any time. A will can be adapted to your circumstances and family as it grows and changes over your life.
6. Tomorrow is not a promise. Acting now is the best way to ensure your wishes are respected and upheld.
7. You can make a lasting impression. A will allows you to share with your community – the people, charities and ideas that are closest to your heart.

A young boy with dark hair, wearing a blue and white plaid shirt, is looking down intently at a small, round object he is holding in his hand. The background is a soft, out-of-focus blue. The overall mood is contemplative and focused.

A GIFT TO THE FUTURE

Let us know about your bequest. You will automatically become a member of the Legacy Torch Society. All members of this special group are honoured for their thoughtfulness and generosity.

There are no other requirements other than naming Melbourne Legacy as a beneficiary in your will. As a Legacy Torch Society member you will be invited to special events where you can meet other like-minded members.

HOW TO LEAVE A GIFT OF REMEMBRANCE TO MELBOURNE LEGACY

If you are considering a Gift of Remembrance, the following are some simple steps you can take to leave a lasting gift with Legacy.

Finding a legal advisor

When creating a will, it is highly recommended to consult a legal professional. This streamlines the process and ensures a valid will.

WHAT ARE MY CHOICES?

A share of your estate

After providing for loved ones, a great way to help is to leave a residuary bequest. You can add to an existing Will without interfering with any sums you have left to family or friends. The smallest percentage, even 1%, of the residuary of your estate can make a difference.

A fixed sum of money

You may wish to leave us a fixed sum of money (known as a pecuniary bequest). Please remember that this type of gift does not allow for changes in your circumstances or inflation.

A specific item

A particular item of value, such as art, real estate or a piece of jewellery, may be sold as part of a specific bequest. Shares from the sale of this item, large or small, would go towards changing the lives of families of veterans.



PREPARING YOUR WILL

We strongly recommend that you consult a legal professional when you create or update your will. They will know what questions to ask and have many useful suggestions for you, making the process easier and ensuring that your will is legally valid.

WANT TO KNOW MORE?

Contact

The Bequest Officer, Melbourne Legacy
E: supporters@legacymelb.com.au
P: 03 8626 0500
All enquiries will be treated in strictest confidence.

Legacy Disclaimer

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RECOMMENDED WORDING

I make this bequest free of all deductions to Melbourne Legacy, of 293 Swanston Street, Melbourne, Victoria, ABN 78 043 769 632.

I request that my bequest be applied for the general purposes of Melbourne Legacy and I direct that the receipt of the Treasurer or other proper officer of Melbourne Legacy shall be a sufficient discharge to my Trustees. I nominate Melbourne Legacy to receive:

The whole of my residuary estate:

.....
.....

Percentage of my estate:

.....
.....

The sum of:

\$.....
.....

Property, real estate, shares etc. (include details)

.....
.....

Other (include details)

.....
.....



OUR PROMISE TO YOU

Joining the Legacy Torch Society is an important decision. Any gift to the future support of veterans' families is generous and significant, and it's one that we want to ensure is fully understood and wished. To you, we want to say:

- Of course, loved ones and family come first. Only once you've supported those people closest to you, we ask that you consider leaving a gift to support the work of Legacy.
- We take your generosity seriously. We put your gift to work doing the greatest possible good for the families of those who lost their life or health serving their country.
- Wills can be updated at any time – the choice always remains with you.
- If you decide to leave a Gift of Remembrance in your will, you are under no obligation to share this information with Legacy. However, we would find it helpful to know your plan to do so. Any such information would be kept strictly confidential. It would give us the opportunity to express our appreciation and invite you to the Legacy Torch Society.



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