

# HOW TO INCLUDE A GIFT IN YOUR WILL

*Together, we can ensure people living with a disability in Bundaberg have their "forever home" and live with dignity, freedom, safety and independence.*

Dignity  
Freedom  
Safety  
Independence



## OVERVIEW:

People with disabilities want much the same things we all want. This includes a comfortable place to call 'home' where they can be part of a small community and feel safe and secure. In addition, with the necessary support to live a full and happy life, they can truly reach their full potential. Families also want peace of mind knowing their loved ones are safe and happy.

## Who are we?

We build houses that become homes where residents, who are living with a disability, are free to be themselves. Where they can feel safe and secure and share with like-minded friends. These houses will be their "forever homes". As a not-for-profit we can offer homes at less than market rental rates - giving residents additional money each week to go out and be part of their community.



## Getting Started

**When making a Will, family and loved ones should always come first.**

You should first talk to your family and loved ones and let them know your intention of leaving a legacy to a Charity.

**You should also seek professional advice from an estate planner or your legal adviser to ensure your wishes are recorded correctly and are legally binding.**

There are different types of gifts which we have listed but we do encourage you to get professional advice.

Leaving a gift in your Will enables the Carinbundi Foundation to continue providing "forever homes" to people in Bundaberg living with a disability.



## Types of Gifts

- pecuniary – a specific gift of cash
- percentage – a percentage of either the residue or the entire estate
- residuary – the remainder of an estate after specific gifts have been disbursed
- specific asset – real estate, shares, bonds or other particular items of value



If you are thinking of leaving a gift in your Will to the Carinbundi Foundation, we would love to talk to you about how you want your gift to be used. There may be a particular area you are keen to support.

We would also like the chance to say **thank-you**. By letting us know you are intending to leave a gift in your Will, we can recognise your generosity in your lifetime as well as plan for the future.

**Together, we can make a difference.**

Contact: Carinbundi Foundation on (07) 4158 9600.

## Wording your Will

Depending on your situation and your wishes, the following is an example of what wording could be used when including the Carinbundi Foundation in your Will:

'I give to the Carinbundi Foundation (ABN 98 623 541 499) free of all duties:

- All my residuary estate (OR)
- \_\_\_% percentage of my residuary estate (OR)
- The sum of \$\_\_\_ (OR)
- List of asset or assets

I declare the receipt of a Director or other authorised officer will be a sufficient discharge to my executor(s) who will not be bound to see to the application of this gift." for the time being shall be a complete and sufficient discharge for the Executor(s).