

# LEAVING A Legacy of Love

Photo: Caritas Fiji

A **Will** is an important document which states how your worldly possessions are to be distributed following your death.

The possessions, property and money which remain after your death are known as your **Estate**.

An **Executor** is a person appointed by you to ensure that your estate is dealt with in accordance with your wishes.

**Probate** is a court order granted by the Probate Division of the Supreme Court which gives the Executor of your Will the power to deal with your estate.

The people or organisations you choose to benefit from your estate are known as your **Beneficiaries**.

A gift in your Will is known as a **Bequest**. They generally fall into one of four categories; **cash** gift which is a sum of money; **specific** gifts such as real estate or shares; a **residuary** gift which is the remainder of your estate after all expenses, debts, taxes and specific gifts have been paid or a **percentage** of your residuary estate. A **residuary** gift is a wonderful way to ensure Caritas Australia receives the most help whilst also ensuring your loved ones are provided for exactly as you would wish.

For your Will to be **formal**, it must be **in writing** and **signed by you** and **two (2) Witnesses** all present at the same time. The witnesses must not be beneficiaries.

Bequests should be made to Caritas Australia for its **General Purposes** which allows us to use your gift where it will have the most impact. It may be used for an emergency appeal, or to help fund a development or educational program here in Australia or overseas. You may wish your estate to be invested in an area of personal interest. In this case, please contact our Gifts in Wills Specialist to discuss the wording as our program and appeals may have changed by the time your Will comes into effect.

# The Wording for your Will

Preparing your Will helps to look after your loved ones and gives peace of mind. We understand that your family and friends come first and that leaving a gift in your Will is a personal decision.

**Whether you're writing a new Will or amending an existing one, including Caritas Australia is simple.**

**There are four different types of gifts you may consider:**

A **cash** gift

is a sum of money. You can ask your solicitor to draft a cash gift to account for inflation.

A **specific** gift

is a specific item or asset.

A **residuary** gift

is the remainder of your estate after all expenses, debts and taxes have been paid, and after any specific gifts.

A **percentage** gift

is a percentage of your residuary estate.

This gift is used if you wish to divide your residuary estate among a number of people or organisations.

Your generous gift will make a real difference. Whatever you decide, we recommend that you work with a solicitor to write your new Will, or amend an existing Will.

**It's easy to include Caritas Australia in your Will. You can use the suggested wording provided below.**

I give...

(Please insert the appropriate statement from the following options:

**A.** The sum of \$ [insert value or description of your gift]

or

**B.** The residue of my estate

or

**C.** [insert number] % of the residue of my estate

to Caritas Australia Limited (ABN 90 970 605 069) for its general purposes absolutely. The receipt of the authorised officer of the organisation shall be sufficient discharge to my executor. If the organisation cannot receive the gift, the gift shall be made to the charitable organisation in Australia that my executor considers most nearly fulfills the objects I intend to benefit.

**“It's not how much we give but how much  
love we put into giving”**

Mother Teresa

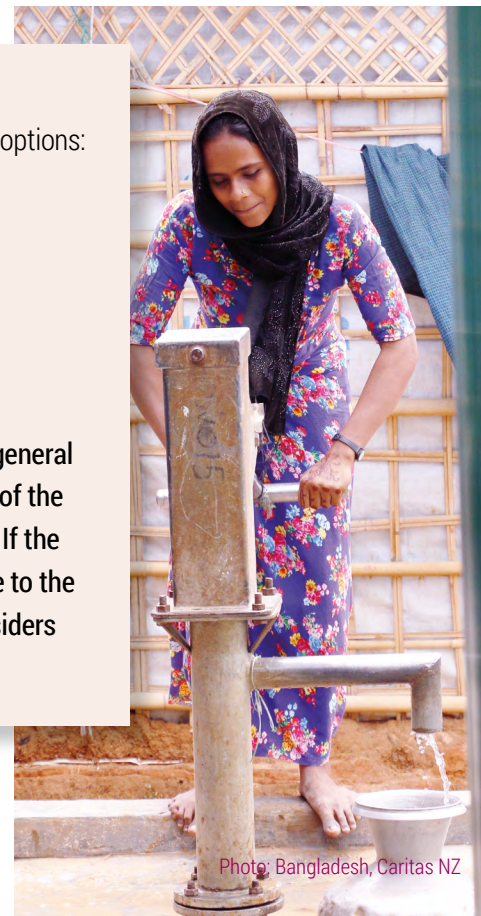


Photo: Bangladesh, Caritas NZ



**Caritas**  
AUSTRALIA

End poverty  
Promote justice  
Uphold dignity

The Catholic Agency for International Aid and Development

Caritas Australia  
24-32 O'Riordan Street  
Alexandria NSW 2015

call: 1800 024 413  
email: [legacyoflove@caritas.org.au](mailto:legacyoflove@caritas.org.au)  
[www.caritas.org.au](http://www.caritas.org.au)





## Get in touch

Caritas Australia is committed to changing lives, but we can't do it without you.  
We would be grateful to know that you are leaving a gift in your Will. This will enable us  
to acknowledge your generosity and keep you in our prayers.  
Please complete the coupon below and email or print and post it to Caritas Australia.

**Privacy statement:** The information provided by you will only be used for the purpose of giving you information about Caritas Australia.

Title ..... First Name .....

Family Name .....

Address .....

Suburb ..... State ..... Postcode .....

Phone ..... Email .....

I have included a gift in my Will to Caritas Australia.

- ☐ I would like to receive correspondence from the Gifts in Wills Specialist.
- ☐ I intend to include a gift in my Will to Caritas Australia.
- ☐ I am considering leaving a gift in my Will to Caritas Australia and would like more information before I make a decision.

Email

Or post to: Caritas Australia  
Reply Paid 84241  
Alexandria NSW 2015  
(No stamp required)

For more information please contact our specialist on **1800 024 413** or email [legacyoflove@caritas.org.au](mailto:legacyoflove@caritas.org.au)