

## GIFTS IN WILLS

A gift for the future

### A Gift in your Will to The Smith Family

By leaving a Gift in your Will to The Smith Family you are helping future generations of Australian children succeed at school, so they can create better futures for themselves.

It's a life-changing gift that will keep on giving.

### How to leave a Gift in your Will

#### Step 1: Speak to your family and loved ones

This is a personal decision for you to make, but we recommend letting your family know that you are planning to leave a gift to The Smith Family so they are aware of your decision.

#### Step 2: Decide what kind of gift to leave

There are three main ways to leave a Gift in your Will to The Smith Family.

##### 1. A residual bequest

You can make a gift of the residue (or remainder), or a percentage of the residue, of your estate once specific gifts and expenses have been taken care of.

##### 2. A specified amount

You can make a specific bequest by simply stating the dollar amount in your Will that you wish to leave to The Smith Family.

##### 3. An asset

You may wish to make a gift of a specific asset, for example real estate, shares of bonds, or an item of particular value.

#### Step 3: Get the help of a professional solicitor

Your Will is an important legal document and a solicitor can help you ensure that your paperwork is in order, worded correctly and presented in the right way.

In order to make this as easy as possible, we have included some guidance on the reverse side of this information sheet, which you can take to your solicitor.

#### Step 4: Making your Will

Your Will must be in writing (handwritten, printed or typed) and include specific wording, suggestions for which are provided overleaf.

Your Will must be signed and dated on every page. Your signature must be witnessed by two people who are not named as beneficiaries of your estate. They both need to sign their own name on every page of your Will.

Your solicitor will be able to assist you.

#### Step 5: That's it!

Once your paperwork is in order, you can trust that you will be making a lasting positive difference to the lives of disadvantaged Australian children for generations to come.

### How to amend your Will

If you have already written your Will, the easiest way to make a gift to The Smith Family is to add a codicil – a short legal amendment – to your Will. This can be organised with a phone call or email to your solicitor, followed by a visit to their office to finalise the amendment and sign the codicil.

### We're here to help you

If you have any questions about leaving a Gift in your Will, we are here to help you.

Please contact Jakki Travers on 02 9805 7118 (or on our toll free number 1800 024 069) or via

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Your Client has expressed an interest in leaving a bequest to The Smith Family. This leaflet contains information you may need to fulfil their wishes.

### Legal Name:

The Smith Family  
ABN 28 000 030 179

### Registered Address:

Level 9, 117 Clarence Street  
SYDNEY NSW 2000

We suggest the following wording should be included in your client's Will:

**"I . . . . . bequeath to The Smith Family ABN 28 000 030 179**  
*(insert the percentage or residue of your client's estate, the amount of money, or the details of assets your client wishes to leave).*

**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."**

### FREQUENTLY ASKED QUESTIONS

#### Who should I contact to discuss matters relating to gifts in Wills?

Please contact Jakki Travers, our National Gifts in Wills Manager. Her contact details appear below.

#### Will my client know which gift is the most suitable type to include?

Your client may be unsure which type of charitable gift they can include in their Will and may need your help to understand the different options that are available to them.

#### Can my client include specific instructions about how their gift will be used?

Including a gift in their Will that supports our work in general terms (for our general purposes) provides The Smith Family with the greatest flexibility to respond to critical priorities in the future. However, if your client would like to be involved in deciding how their gift to The Smith Family will be spent when the time comes, we would be more than happy to help and discuss their wishes. We want to help you to ensure that their wishes can be fulfilled and ensure that their gift will not fail.

#### Is The Smith Family an endorsed charity with Deductible Gift Recipient (DGR) status?

Yes. The Smith Family is a Public Benevolent Institution endorsed by the Australian Taxation Office (ATO) with charity tax concessions relating to Income Tax, GST and FBT. We are also endorsed as a deductible gift recipient (DGR). Because we are exempt from Capital Gains Tax and eligible to claim Franking Credits, it may be beneficial for your client to consider gifting their property or their share portfolio rather than having it converted to cash, as this may have tax advantages for their Estate.