

# How to include a gift in your Will



## **Creating a world free from stroke will take more than just one lifetime.**

We can't think of a better way for your kindness to live on than to leave a gift in your Will to the Stroke Foundation.

By making the Stroke Foundation a part of your legacy, you will help to create a future free from stroke for the generations of Australians to come after you.

Once you've taken care of your family and friends, including a gift to the Stroke Foundation in your Will is such an easy and wonderful way to make a lasting impact on our work.

## **What you can do next**

The next time you update or change your Will, simply ask your solicitor or Trustee Company to insert a few simple words into your new Will. Our suggested wording is outlined over the page. This short clause contains all the details of the gift you'd like to leave to fight stroke after you've gone. There is also a simple checklist about what you might need to think about.

Please put this somewhere for safekeeping and take it along to your solicitor when you are next updating your Will.



## Suggested wording for your Will

It may be helpful for your solicitor to have reference to our suggested wording when updating your Will. Simply ask your solicitor to insert the appropriate clause selected from the wording below into your Will:

### **"I give free of all duties or taxes...**

*[Please insert here the appropriate statement selected from the six options below:]*

- 1. the whole of my estate**
- 2. *[insert number]* percent of my estate**
- 3. the residue of my estate**
- 4. *[insert number]* percent of the residue of my estate**
- 5. the sum of \$ *[insert value of your gift]***
- 6. *[insert number]* of my *[insert name of shares]* shares.**

**...to the Stroke Foundation (ABN 42 006 173 379) for its general purposes. The official receipt of the organisation shall be a full and sufficient discharge to my executor."**

Everyone should have an up-to-date Will. It's easy to get one written for the first time or have your current Will revised.

Whenever the time is right for you, please remember to include a gift to the Stroke Foundation in your Will to help create a future free from stroke.



## **Checklist for writing or updating your Will**

Here's a quick checklist of the six most important points you need to remember when it comes time to write or update your Will:

### **1. What do you have to leave behind?**

You could start by making a list of what you own to give you an idea of the total value of what you can leave behind – your estate.

This will give you a good idea of the total value of your estate, which you will be able to share amongst the people and causes you care most about.

### **2. Who would you like to include in your Will?**

Make a list of all the people closest to you and your favourite charities you want to remember in your Will.

### **3. How do you want to divide up your estate?**

Decide what you'd like to leave to each of the people and charities on your list. There are different types of gifts you can include, such as a portion of your estate, investments or a proportion of whatever is left over afterwards (the residue of your estate).

### **4. Have you found a solicitor to write or update your Will?**

Your Will is one of the most important legal documents you have. Consulting with a qualified solicitor or Trustee Company and giving them proper instructions about what you'd like to include in your Will is the best way to make sure what you want to happen after you pass away is what actually happens.

To find a local Will and probate solicitor or Trustee Company, contact the Law Society or Law Institute in your state or territory.



## 5. Have you asked your solicitor to include a gift to the Stroke Foundation in your Will?

It's simple to include a gift to the Stroke Foundation in your Will. Just decide what type of gift you'd like to include and ask your solicitor to refer to the Stroke Foundation (ABN 42006173379).

## 6. Have you updated your Will to reflect any major changes in your life?

Whenever there is a significant change in your life, you should think about updating or revising your Will to reflect that. For example, you should plan to update your Will if you've recently:

- › Lost your spouse or partner.
- › Married, divorced or re-married.
- › Had children or grandchildren.
- › Retired.
- › Moved home.
- › Come into some money or an inheritance.

## Other things to consider

It's a good idea to discuss important aspects about your Will with your family, friends and executors. This is especially important if your decisions about how to divide up your estate might come as a surprise to them. This way you can make sure your final wishes are carried out in the way you would like them. Make sure your Will is kept in a secure place that is easy to find and ensure your executor knows where it is located.

Should your circumstances change in the future, you can easily alter or update your Will.

For more information, contact the Gifts in Wills team:

☎ 1300 194 196

✉ [giftsinwills@strokefoundation.org.au](mailto:giftsinwills@strokefoundation.org.au)

🌐 [strokefoundation.org.au/donate/gifts-in-wills](http://strokefoundation.org.au/donate/gifts-in-wills)

