

BEQUEST INFORMATION

For **legal advisors**



ST JOHN OF GOD
Foundation



Bequest information for your client

Thank you for assisting your client to consider a gift in their will to the St John of God Foundation. Your client's gift will help to ensure the very best health care is available for people in their time of greatest need, now and into the future.

The St John of God Foundation manages donations and bequests on behalf of all the hospitals and facilities of the St John of God Health Care Group across Australia.

The Foundation's goal is to help generous individuals make an impact with their gift through research, treatments, equipment and facilities.

The Foundation is grateful for bequests of all sizes and works with donors to ensure that their bequest achieves their wishes.

The impact of their gift

Whether your client chooses to make a gift to their community during their lifetime or to leave a gift in their will, we want to follow their wishes whenever we can.

Please talk with us, or ask your client to talk with us, if they would like to choose and discuss the impact of their gift.

Their gift could be used to support one of our hospitals or dedicated to support the St John of God Foundation in responding to the needs of the community at that time.

We are grateful for gifts of any size and we appreciate the opportunity to talk with donors about how they would like to be remembered and how we may be able to acknowledge their gift in their name or in memory of a loved one.

Please call us if we can help you to follow your client's wishes.

Legal details

St John of God Foundation

ABN: 64 715 901 441

Address: Level 1, 556 Wellington Street, Perth WA 6000



Types of gifts and wording for your Will

1. Residuary

A residuary gift is made from the remaining balance of your Estate after all other financial commitments have been honoured. You can choose to give all, or a percentage, of your residuary Estate.

Example:

I give and bequeath to St John of God Foundation Trust (ABN 64 715 901 441) of Level 1, 556 Wellington Street, Perth WA 6000, free from all duties, for its sole benefit absolutely, the residue of my Estate *[or [insert %] of the residue of my Estate]* to be applied by it for the benefit of St John of God Health Care and in respect of this bequest I declare as follows:

- A. A general charitable intent shall apply to this bequest, for the purpose or purposes that St John of God Foundation Trust sees fit.
OR
- A. I request that my bequest be applied for the purpose of *[insert specific purpose e.g. particular hospital or program or research area]*.
[delete whichever of the above two options does not apply]
- B. The receipt of the Chief Executive Officer of St John of God Foundation shall be a full and sufficient discharge to my executors for the payment of this bequest.
- C. If at any time, and for whatever reason, it becomes impracticable for St John of God Foundation Trust to continue to apply the fund for the purpose or purposes directed by me in this, my Will, then St John of God Foundation Trust may apply the income of the fund (and any capital) for such other purpose or purposes as St John of God Foundation Trust determines are most closely in accordance with my directions.
- D. My executors shall not be obliged to see or inquire into the application of this bequest.

2. Pecuniary

(Specific sum of money or gift-in-kind)

A pecuniary gift provides a specific amount of money or a particular asset such as a work of art, the proceeds of property, a life insurance policy or stocks and shares. In the case of a specific amount of money, inflation may impact the value of your gift and you may wish to include a clause to preserve the value of your bequest. In this regard, please consider seeking professional legal advice.

Example:

I give and bequeath to St John of God Foundation Trust (ABN 64 715 901 441) of Level 1, 556 Wellington Street, Perth WA 6000, free from all duties, for its sole benefit absolutely, *[the amount of \$[insert amount] or [describe asset accurately, such as 'my units/shares in Trust/Ltd', or 'my property situated at [insert street address]']* to be applied by it for the benefit of St John of God Health Care and in respect of this bequest I declare as follows:

- A. A general charitable intent shall apply to this bequest, for the purpose or purposes that St John of God Foundation Trust sees fit.
OR
- A. I request that my bequest be applied for the purpose of *[insert specific purpose e.g. particular hospital or program or research area]*.
[delete whichever of the above two options does not apply]
- B. The receipt of the Chief Executive Officer of St John of God Foundation shall be a full and sufficient discharge to my executors for the payment of this bequest.
- C. If at any time, and for whatever reason, it becomes impracticable for St John of God Foundation Trust to continue to apply the fund for the purpose or purposes directed by me in this, my Will, then St John of God Foundation Trust may apply the income of the fund (and any capital) for such other purpose or purposes as St John of God Foundation Trust determines are most closely in accordance with my directions.
- D. My executors shall not be obliged to see or inquire into the application of this bequest.

3. Percentage (or fractional)

This gift is a percentage or part (fractional) value of your Estate, taking into account the changing value of an Estate.

Example:

I give and bequeath to St John of God Foundation Trust (ABN 64 715 901 441) of Level 1, 556 Wellington Street, Perth WA 6000, free from all duties, for its sole benefit absolutely, *[insert percentage number]*% of my Estate to be applied by it for the benefit of St John of God Health Care and in respect of this bequest I declare as follows:

- A. A general charitable intent shall apply to this bequest, for the purpose or purposes that St John of God Foundation Trust sees fit.
OR
- A. I request that my bequest be applied for the purpose of *[insert specific purpose e.g. particular hospital or program or research area]*.
[delete whichever of the above two options does not apply]
- B. The receipt of the Chief Executive Officer of St John of God Foundation shall be a full and sufficient discharge to my executors for the payment of this bequest.
- C. If at any time, and for whatever reason, it becomes impracticable for St John of God Foundation Trust to continue to apply the fund for the purpose or purposes directed by me in this, my Will, then St John of God Foundation Trust may apply the income of the fund (and any capital) for such other purpose or purposes as St John of God Foundation Trust determines are most closely in accordance with my directions.
- D. My executors shall not be obliged to see or inquire into the application of this bequest.

4. Whole Estate

You can choose to bequest your entire Estate.

Example:

I give and bequeath to St John of God Foundation Trust (ABN 64 715 901 441) of Level 1, 556 Wellington Street, Perth WA 6000, free from all duties, for its sole benefit absolutely, 100% of my Estate to be applied by it for the benefit of St John of God Health Care and in respect of this bequest I declare as follows:

- A. A general charitable intent shall apply to this bequest, for the purpose or purposes that St John of God Foundation Trust sees fit.
OR
- A. I request that my bequest be applied for the purpose of *[insert specific purpose e.g. particular hospital or program or research area]*.
[delete whichever of the above two options does not apply]
- B. The receipt of the Chief Executive Officer of St John of God Foundation shall be a full and sufficient discharge to my executors for the payment of this bequest.
- C. If at any time, and for whatever reason, it becomes impracticable for St John of God Foundation Trust to continue to apply the fund for the purpose or purposes directed by me in this, my Will, then St John of God Foundation Trust may apply the income of the fund (and any capital) for such other purpose or purposes as St John of God Foundation Trust determines are most closely in accordance with my directions.
- D. My executors shall not be obliged to see or inquire into the application of this bequest.

For further information:

P 1800 281 288 E Foundation@sjog.org.au

A Level 1, 556 Wellington Street, Perth WA 6000
PO Box 5753, St Georges Terrace, Perth WA 6831

sjogfoundation.org.au



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