



GIFTS IN WILLS

**How to leave a
legacy that will
protect what
matters most**

Create a future in which stroke can't take away the things you love

Every 19 minutes, another Australian has a stroke.

They'll be our sisters, husbands, daughters, dads and best mates. In the years to come, they'll be our children and grandchildren.

By leaving a gift in your Will, you can help ensure a future where stroke no longer has the power to take away the things you love. Where stroke can no longer devastate lives and families.

Your gift to Stroke Foundation – no matter how large or small – will help Australians beat stroke in the years to come.

Our promise to you

When people are kind enough to remember Stroke Foundation in their Will, we promise to:

- Use your gift carefully and wisely so it can have the greatest impact for the stroke community.
- Give you and your loved ones the opportunity to be connected with the work you are supporting.
- Take care with your gift, treat it with sensitivity and respect.
- Recognise and appreciate your Will is completely personal to you.
- Recognise your family and loved ones always come first.

We publish independently audited accounts each year, demonstrating how your Gift in Will is helping to create a future in which stroke doesn't take away the things we love.



Updating your Will to include a legacy

Most of our supporters include a gift to Stroke Foundation in their Will when they update it to reflect a change in circumstances. For peace of mind, many estate lawyers recommend that you review your Will every five years.

It is also timely to review your Will if:

- A major life change has occurred in your family, such as the birth of a child.
- A beneficiary named in your Will passes away.
- You marry, become separated or divorce.
- Your financial circumstances change significantly.

We know thinking about death and what will happen after we are gone is uncomfortable. But it is important. Take the time now and write or update your Will to ensure your wishes are fulfilled.

A checklist for updating your Will

Here are some major items for consideration:

- Assets and liabilities**
Before meeting with your solicitor, take an inventory of your financial assets and liabilities and their value e.g. property, bank accounts, investments, retirement funds, credit cards, loans etc.
- Beneficiaries – who will receive your assets?**
A beneficiary can be an individual person, persons or group of people and/or an organisation.
- Gifts of items that you own**
To make a bequest you need to write the gift or item to be given, along with the beneficiary's name, their relationship to you, their occupation and full address.
- Gifts to charities**
After providing for your family and loved ones you could leave a gift to the causes that are close to your heart, such as the Stroke Foundation.
- Executor**
Name of individual or organisation who will carry out the wishes in your Will.

Choose the legacy that's right for you

Residual legacy

What's left of your estate after all of your wishes have been carried out and expenses in finalising your estate have been met.

Residual bequests allow you to take care of your loved ones and financial commitments first. They also adjust automatically to changes in the value of your estate and hold their value over time.

Pecuniary legacy

A specific monetary amount. While these gifts provide you with certainty, they can lose their value over time due to inflation.

Specific legacy

A specified item such as property or shares. Again, these gifts can provide certainty, but only if the asset isn't sold or disposed of before you pass away.

Every bequest we receive – no matter the size – is important. Talk to your solicitor about the most appropriate gift for your circumstances.



How to include a gift in your Will to Stroke Foundation

STEP 1

Think about the size and type of gift you wish to give.

Most of our supporters choose to leave a residual legacy. These gifts hold their value regardless of inflation and allow you to cover loved ones' needs first.

STEP 2

Decide how you would like your gift to be used.

Stroke Foundation's work is broad and constantly evolving in response to advances in stroke research, treatment and support.

That's why most of our supporters choose to leave a gift for "general purpose", so it can be spent in the best way possible in the years to come. But if you'd like your gift to go towards a specific area, contact our Gifts in Wills team.

STEP 3

Speak to your solicitor or Trustee Company.

Ask them to include your chosen gift to Stroke Foundation when you write or update your Will. You might like to take along a copy of this brochure, which has all the information they'll need.

Suggested wording for your Will

I give free of all duties or taxes...

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

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.

Gifts in Wills: your questions answered

How do I leave a gift to Stroke Foundation in my Will?

You can use the suggested wording on the previous page as a guide when speaking to your solicitor or trustee company.

How much does including a gift in my Will cost?

Writing or updating a Will isn't as expensive as you might think. Solicitors can provide estimates, but the cost will depend on how complex your personal affairs are.

Do I have enough money to leave a gift in my Will?

Many everyday Australians include charitable gifts in their Wills. They can look after their loved ones AND the causes that matter to them most. Every gift will help us continue our work to prevent, treat and beat stroke.

Can I add a gift to Stroke Foundation to my existing Will?

Yes – it's as simple as adding a codicil or an amendment. We recommend that you consult your legal advisor to assist you with this.

How do I make sure my loved ones don't miss out?

You can include a gift to Stroke Foundation after you've taken care of family and friends. Ask your solicitor or trustee company about the best way to do this.

How will my gift be used?

Your generous gift will go to the area of most need at the time. This could be research to find the next breakthrough in the fight against stroke, or on supporting Australians impacted by stroke. You can contact our Gifts in Wills team if you'd like your bequest to go to a specific area.

Should I tell you when I've included a gift in my Will?

You don't have to, but we'd love for you to let us know. This will allow us to thank you personally, and keep you updated on how your gift will leave a legacy that protects what matters most.

How will we know when we've beaten stroke?

When it can no longer take away the things we love.

Please leave a gift to Stroke Foundation in your Will.

Your legacy can protect what matters most.



Contact us



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strokefoundation.org.au/giftsinwills

Stroke Foundation [ABN 42 006 173 379]

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