

THE Catholic Weekly

Charity, patience and tenderness are very beautiful gifts. If you have them, you want to share them with others.

- Pope Francis

Gift of time

A Bequests and Wills Guide

ADVERTISING SUPPLEMENT

Caritas Australia

The Catholic Agency for International Aid and Development

Dorothy is a long-time supporter of Caritas Australia. Inspired by her faith and passion for social justice, Dorothy speaks about why she has decided to place Caritas in her Will.

I first learned about Caritas when I was a child at school and vividly recall collecting coins for the Project Compassion Box.

Giving to Caritas Australia has made me a much happier person. I feel empowered, knowing that we're doing something for the most marginalised.

The sense of concern that I sometimes feel thinking about the poverty and suffering in the world today, has been taken away by knowing where my money is going and that it's going to a good cause.

The last time I get to speak to people most important in my life will be through my Will. I have great faith in Caritas Australia's ability to end poverty and uphold people's dignity. Caritas doesn't tell its partners what to do but walks alongside them.

There are so many charities out there, but I know that with Caritas, I'm giving in the right way, to a place that has good governance, a good development approach and spends minimally on administration.

I can recommend Caritas wholeheartedly.



Photo: Sudan, Caritas Internationalis

“Giving to Caritas Australia has made me a much happier person”





Leaving a Legacy of Love.

Your guide to gifts in Wills

Photo: Caritas Fiji

Naming Caritas Australia as a beneficiary of your estate allows us to help more families whose lives have been devastated by COVID-19, natural disaster and conflict to become self-sufficient.

The beauty of the Caritas network is, through the worldwide outreach of the Catholic Church, we are able to bring together local knowledge at the grassroots level with the combined expertise and resources of a global network to amplify the voices of those who suffer in our own country and throughout the world.

We would be privileged to partner with you and share your values with the world's most marginalised, so that they may live a life worthy of their dignity.

We value the trust you have placed in Caritas Australia and thank you for considering a gift in your Will.

To leave an enduring legacy of love, contact our Gifts in Wills Specialist on 1800 024 413 or email legacyoflove@caritas.org.au. You can find the wording for your Will at www.caritas.org.au or request a brochure.



End poverty
Promote justice
Uphold dignity

WHEN SHOULD WE WRITE A WILL?

What is a Will?

A will is a legal document that records your intentions concerning the distribution of your wealth, property or assets, amongst your loved ones following your departure.

Having a will, prepared by your lawyer, is especially important to avoid any disputes amongst your family and friends, during such a difficult time.

When should we write a Will?

Consider either preparing or updating your will, especially on key milestones in your life, including when you get married, have children, or secure new properties and assets.

The death of loved ones might also be a reason to review and update your will to ensure it remains relevant and clear, especially to the remaining beneficiaries.

If you don't have a will it's time to get your affairs in order.

Here are some more examples of when you should consider implementing or updating your will.

- change of Executor/s
- changes to your marital status
- changes to your financial situation such as a significant increase or decrease in your assets
- loss of your spouse
- birth of children and grandchildren
- changes in circumstances with people named in your will
- inclusion or updating charities
- change in personal details
- medical conditions of you or your dependents
- purchase of a new family home



Seeking Legal Advice

Your will is an important legal document and it is best completed by a legal professional. While most wills can be straightforward, others are complicated and require specific legal skills to make sure your intentions are clear. This can address problems when your will is used to organise your final arrangements and to distribute your estate. Your solicitor can keep your will in safe custody and give you copies. It's always a good idea to discuss the contents of your will with family members or close friends so that they understand what you have decided to do and it's an opportunity for you to answer any questions that they may have.

The Law Society of NSW can be contacted if you need to find a local solicitor with expertise in preparing Wills and Estate Planning - www.lawsociety.com.au or phone (02) 9926 0156.

TYPES OF GIFTS IN WILLS



A gift in your will is a legacy to people and organisations from your estate. Your estate is the total value of all of your assets at the time you die. This includes bank deposits, shares in companies, property, personal possessions, vehicles and other investments.

You can specify how you will allocate your estate in various ways including:

- a specific amount of money
- a gift of your whole estate
- property that you own
- a percentage of your estate
- gifts of specific belongings such as jewellery & household contents
- the residue of your estate after you have provided for your loved ones

When considering leaving a legacy, it's a good idea not to be too restrictive in stipulating its use because

a program operating today could be cancelled in the future.

Benefiting Future Generations

A gift in your will to the people and causes that align with your passion to help solve problems in the world is very noble and generous. It doesn't cost anything in your lifetime and is only activated after your death. It could be difficult to support charitable causes financially but you could be in a position to leave a gift in your will.

Charities depend on income from bequests to fund future projects and your generosity can live on for decades and provides opportunities and hope for future generations.

Contact a Charity

Contact any of the charities listed in this guide to find out more about how to leave a gift in your will.



Share our Faith and our Works with Future Generations

Consider the Catholic Archdiocese of Sydney in your Will today. For 2000 years, our Catholic faith has been fostered and is the source of many good works. A bequest with the Catholic Archdiocese of Sydney is a way to preserve our faith and our good works, ensuring they are shared with future generations.

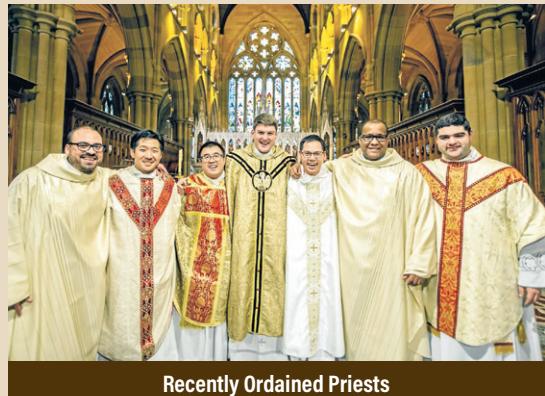
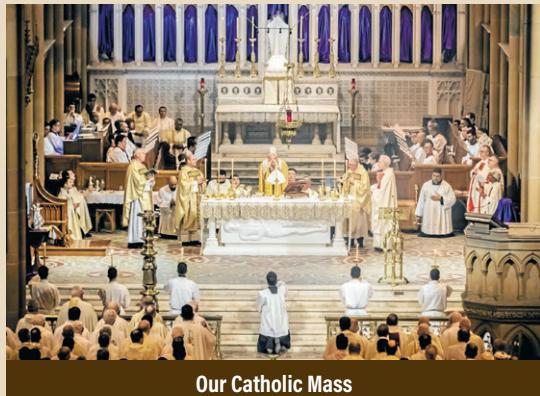
Your legacy will continue to support:

- The proclamation of the Gospel and our Catholic faith
- Food and accommodation to single mothers facing homelessness
- Aid and support to those disabled or deaf
- Formation for our future seminarians
- Restoration of our Mother Church, St Mary's Cathedral in Sydney

- Catechesis to students in schools
- Support to our retired Priests
- And much more

After you have taken care of your loved ones, a gift you may like to consider is a percentage or the residue of your estate. This is one of the many options you might consider in establishing a legacy gift in your Will.

For more information, call our Planned Giving Specialist, **Richard Allcock**, on **02 9307 8442** or email richard.allcock@sydneycatholic.org and ask for our free Wills guide today!



Our Catholic faith and works

Today's Catholics in Sydney continue to support our agencies like the Charitable Works Fund, the Priests' Retirement Foundation and the St Mary's Cathedral National Trust.



Dear Friends,

Our Catholic faith, and our works, have shaped our history for 2,000 years and continue to do so today, both in Sydney and beyond.

Inspired by the teachings of Jesus, our faith has moved Christians to bring about charity and love in the world, which has led to the conversion of nations.

Our moral codes and canon laws have influenced legal systems across Europe, and beyond.

Institutions like schools, hospitals, aged-care facilities and many others have all largely stemmed from our Catholic tradition.

Disciplines like philosophy, astronomy, science and medicine were either strengthened or born from our Catholic milieu.

There is no doubt Catholics have many challenges at present.

However, there is also a tremendous amount of good born from our Church, and remains offered to the wider community.

Today, Catholics in Sydney continue to support our agencies like the Charitable Works Fund, the Priests' Retirement Foundation and the St Mary's Cathedral National Trust.

This in turn continues our works of healing the sick, housing the homeless and caring for our elders.

It supports our mission of providing future priests, and catechising Catholic students in State schools.

It provides material support to sustain our iconic places of worship, like St Mary's Cathedral and preserves our Catholic art, which conveys our story and truth.

These works have supported people around the world for 2,000 years, and I ask you today to please continue this ministry, so that future generations may also come to know and encounter Jesus.

May I take this opportunity to thank you for taking the time to read our Catholic story, and for further considering your role in building our Church for tomorrow.

Thank you and God bless!



Michael Mendieta
Director, Development and
Fundraising Office - Catholic
Archdiocese of Sydney



St Mary's Cathedral
National Trust

Over many years, Catholics, Christians, visitors and admirers of our Cathedral have made possible the building of St Mary's Cathedral through their generous gifts left to this magnificent heritage building.

Since then, similar generosity is what has preserved and cared for the Cathedral which we `use today to pray, seek refuge and adore our faith.

The conservation program that protects St Mary's Cathedral is in ongoing need, as the Cathedral endures years of natural elements and human interferences.

In recent years works have included:

- Stone restoration
- Replacing roof tiles
- Conserving the Stations of the Cross
- and much more

With your support, St Mary's Cathedral can be protected and assured to last for generations to come. Serving as the heart of the Catholic faith in Sydney, the iconic Cathedral requires continual updates, maintenance and restoration.

If the Cathedral holds a place in your heart or your family's, consider remembering St Mary's Cathedral in your Will, where you can leave a lasting legacy in Sydney for the generations of people to come.

THE CHURCH CONTINUES THIS MINISTRY AND INVITES YOU TO JOIN US

The Seminary of the Good Shepherd

The heart and future of the Catholic Church in Sydney begins here—at the Seminary of the Good Shepherd and the Redemptoris Mater Seminary.

It is the training ground for future priests and deacons of the Archdiocese of Sydney and surrounding dioceses of NSW.

These seminaries are places of "intense formation". They seek to develop men strong in faith, hope

and love who are willing to give their lives to their Lord and the ones that they have been called to serve.

Your donation will:

- cover the daily living expenses of these seminaries which serve as houses of spiritual growth, character development and brotherhood.
- support the pastoral formation of seminarians at the Catholic Institute of Sydney.



The Seminary needs your help to form our future priests for generations to come.

Consider leaving a legacy gift today.



The formation of our Catholic children in public schools is strengthened through the volunteer catechists that are trained and supported by

The Confraternity of Christian Doctrine

the Confraternity of Christian Doctrine (CCD). Since its formation in 1958, CCD Sydney has taught over 1 million students and every week, a dedicated team of over 2,300 catechists travel across NSW bringing the Good News to 30,000 children in over 400 schools. Using a pedagogy of inductive and deductive reasoning the curriculum introduces students to the love of God, the truths of the faith and opens up the pathway to the

Sacraments

Your donation will:

- develop programs and resources to help spread the Gospel to children.
- provide quality training and professional development to catechists.

CCD needs your help to teach the Catholic faith to children in public schools.

Consider leaving a legacy gift today.

Aboriginal Catholic Ministry

The Aboriginal Catholic Ministry (ACM) provides pastoral care and support to Sydney's Catholic Aborigines.

In his historic Alice Springs address in 1986, Pope St John Paul II said "the church in Australia would not reach its potential until Aboriginal people had made their contribution to her life". ACM seeks to make this hope a reality. Operating from two premises, Reconciliation Church and its Alexandria Office, the ACM offers a range of services including Sacramental preparation,

monthly cultural Mass, prayer resources, support with funerals and baptisms, prayer groups and pastoral support.

The Ministry also provides an interface between Indigenous Catholics and the wider Catholic and political community. They connect Aboriginal educators and speakers with schools and parishes. Where necessary, the ACM will act as advocates and provide counselling services and practical aid.

The ACM hopes to build ties with



Nungalyina and Wontulp Bi Buya Indigenous theological colleges to support the spiritual development of Indigenous Catholics in Sydney.

Help our Sydney Aboriginal Catholic reach their full potential.

Consider leaving a legacy gift today.

CatholicCare

With more than 100 programs running to assist those in need, CatholicCare is the social services agency of the Archdiocese of Sydney.

Every day CatholicCare's 600 staff and nearly 200 volunteers work to strengthen families, individuals and build community from their sites at Bankstown, Belmore, Cabramatta, Fairfield, Lakemba, Lewisham, Liverpool, Woolloomooloo and Sydney.

Every age has its own invisible people and since its beginning in

1941, CatholicCare has cared for those who have no one else. Following the example of Christ, their programs seek to assist anyone in need; those struggling with their marriage, new parents, crisis pregnancy support, the elderly, the disabled, the unemployed, children in need of foster homes and those afflicted with gambling, addiction or poor mental health. In 2018, with the introduction of CCareline telephone service, CatholicCare received over 20,000 calls for help.

Marriage breakdown, mental



health issues and an ageing population are on the rise, and the need for support is only going to increase.

CatholicCare hopes to expand their services across NSW, but to do this, they need your help.

Consider leaving a legacy gift today.



The Ephpheta Centre is a special ministry for the deaf and hard of hearing run by the Catholic Archdiocese of Sydney, and supported by the dio-

ceses of Parramatta and Broken Bay.

The Centre organises weekly Mass in Auslan (Australian sign language) as well as social and pastoral outreach including a youth group, women's group, men's group, craft group and home visits.

For 40 years, Ephpheta has opened the riches of the Catholic faith to the deaf community of Sydney and hopes to do so for another 40 years.

Your donation will:

- support a wide range of initiatives

The Ephpheta Centre

for the deaf and hard of hearing including men's, women's, youth, craft and other interests groups

▪ help train seminarians and priests in Auslan so the sacraments can be more accessible for the deaf and hard of hearing Catholic community.

The Ephpheta Centre needs your help to spread the Catholic faith to those that are deaf and hard of hearing.

Consider leaving a legacy gift today.

Priests' Retirement Foundation

The Priests' Retirement Foundation of the Archdiocese of Sydney ensures all priests can receive the accommodation, health care and support they need in their retirement. There are now over 75 retired priests in Sydney, many of whom worked long into their 70's, caring for the spiritual life and welfare of their people.

The Archdiocese gives two dollars for every dollar contributed to the Priests' Retirement Foundation.

The Priests' Retirement Foundation covers needs such as:

- Convalescence care.
- Nursing home and hostel care for frail priests.
- Assistance in transitioning to retirement.
- Health insurance.
- Medical and dental expenses.
- Assistance with board and lodging expenses.

Our retired priests have given so much to us, and the



Priests' Retirement Foundation is an opportunity to give back.
Consider leaving a legacy gift today.

Charities in the Catholic Archdiocese of Sydney

- Charitable Works Fund
- The Priests' Retirement Foundation
- St Mary's Cathedral National Trust
- Aboriginal Catholic Ministry
- Ephpheta Centre
- The Confraternity of Christian Doctrine
- Seminary of the Good Shepherd, Archdiocese of Sydney
- Redemptoris Mater Seminary
- University Chaplaincies
- CatholicCare



Charitable Works Fund



Priests Retirement Foundation



St Mary's Cathedral

Contact our Planned Giving Specialist (Richard Allcock) today.

Phone: (02) 9307 8443

email richard.allcock@sydneycatholic.org

Ask for our free Wills guide

Consider leaving a legacy gift today.

Please send me your free gift in Wills guide I am interested. Please contact me to further discuss I am leaving a gift in my Will.

TITLE: _____ FIRST NAME: _____

SURNAME: _____

ADDRESS: _____

POSTCODE: _____ PHONE: _____

EMAIL: _____

Questions/Queries

Please post to: Catholic Archdiocese of Sydney, Development and Fundraising Office, Level 7, 133 Liverpool Street, Sydney, NSW, 2000.

Ph: 1800 753 959 Email: bequests@sydneycatholic.org

Acts of generosity

Generosity is a wonderful human trait that most of us possess. As a young child you would have witnessed acts of kindness undertaken by your parents and grandparents.

Whether it was responding to a door knock appeal, putting loose change in a charity moneybox, donating unwanted clothes or giving a neighbour a bag of vegetables, your garden had in

abundance. And during your own lifetime you have supported great causes directly and indirectly, probably bought thousands of raffle tickets, attended (and likely helped organise) hundreds of fundraising functions from school fetes to church dinners and you make donations to charities on a regular basis.

Over the years you have given your time and skills

through volunteering for charities, churches, hospitals, schools and vital community services. These are all acts of generosity that teach the joy of giving to your own family through example.

When you prepare your will, consider leaving a gift to your favorite charities as this allows your passion for supporting great causes to live on for future decades.



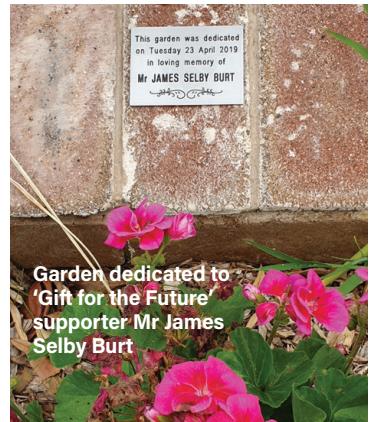
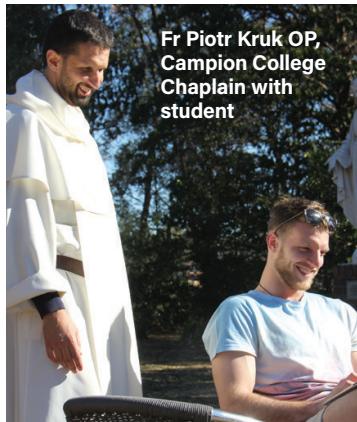
A homeless man sleeps in a doorway. Pope Francis called on Christians to join in prayer and acts of care for the earth and for the poor. PHOTO CNS/PHIL NOBLE, REUTERS

'Gift for the Future'

Campion College Australia is a Catholic tertiary institution dedicated to providing a foundational education in the liberal arts. As an independent institution of higher learning, the college does not receive government or Church funding. Instead, it relies on the generosity of those who support its mission – *'To provide a foundational education in the liberal arts that integrates the insights of faith and reason.'*

While support for the college can take a variety of forms, a '*Gift for the Future*' is one of the most powerful ways you can help secure the future of Campion College. By including a gift to the Campion Foundation* in your Will, you can help support college activities, projects, residential life and student needs long into the future. You may choose to gift a specific amount, a percentage of your estate or the residue of your estate after providing for family.

A gift in support of Campion College is not an alternative to looking after your family; it is an integral part of safeguarding their future. By joining hands with the college, you contribute to the development of virtuous and compassionate Campion graduates. These graduates will become educators, healthcare workers, lawyers, politicians, evangelists and business professionals... the very people who will ensure the wellbeing of



those you love for years to come. A gift in your will really is a '*Gift for the Future*'. You can truly make a difference to the lives of young people and through them, in the lives of those you love.

Please visit: www.campion.edu.au/bequests for further information.

To indicate your intention to leave a gift to Campion College, please fill out the form at: www.campion.edu.au/giftforthefuture.

If you would like to discuss in confidence how you can support Campion College, contact: Director of Development, Yvette Nehme, (02) 9896 9318, foundation@campion.edu.au

*The Campion Foundation is a private non-profit organisation which supports Campion College Australia with a program of fundraising and administration of gifts. The Foundation works closely with the college in building up a solid financial base for Campion College and directing gifts to the college's most important needs.



“ *We must look where
we have been in order to know
where we are going.* ”

SAINT EDMUND CAMPION

Gift for The Future



2019 Graduate
Micah Doughty.



2019 Graduate
Cécile Ellis.



2018 Graduate
and Medal Winner
Laura Ryan.

A gift in your Will really is a ‘Gift for the Future’. You can truly make a difference to the lives of young people, for generations to come, by considering leaving a bequest, a living legacy, to Campion College Australia.

Giving Beyond the Borders of Life

Reaching People for Christ in Eastern Europe



"You have never really lived until you have done something for someone who can never repay you."
Saint Mother Teresa of Calcutta.

For nearly 60 years, Mission Without Borders has been serving poor and destitute children, families, elderly, homeless and disabled people in the former communist countries of Albania, Bulgaria, Bosnia-Herzegovina, Moldova, Romania and Ukraine. Reaching People for Christ is our vision and mission - sharing His love through material, emotional and spiritual means, changing lives and giving hope.

Mother Teresa's claim is true for Mission Without Borders and can be a true statement of your life also, when you choose

to leave a Gift in a Will to Mission Without Borders (MWB).

Your Gift in Will ensures that families like the Caldara family of Romania, will have the opportunity to break out of the poverty cycle into a self-sufficient life. This family live in a rundown shack with no electricity or running water, in a rural village where the nearest school is 30 kms away and job opportunities scarce. The roads are mud when it rains or after the snow melts and the winter temperature can be as low as minus 20 degrees Celsius.

It is here, in villages forgotten by their own countries and the world, that Mission Without Borders brings life-giving aid through the Love and



Hope of Jesus Christ. Mrs Caldara said: "I have lived a very hard life but I truly hope that my children's lives will be changed for the better, now that MWB is involved in our lives. **If you don't help us, no one will!!**" Currently, 51% of all children under 18 years old in Romania are at risk of poverty.

Please consider leaving a Gift in Will to Mis-

sion Without Borders. Whether you are writing your first Will or amending your current Will, your compassion will continue to reach the poor and needy, beyond the borders of your life.

Contact our office today on 02 9674 2022 or email australia@mwbi.org to express your interest to leave a Gift in Will and to speak to our Bequests Manager.



A **GIFT** THAT **WILL REACH BEYOND THE BORDERS**

MISSION WITHOUT BORDERS
REACHING PEOPLE FOR CHRIST
IN EASTERN EUROPE

(02)9647 2022
www.mwb.org.au



Hope, Legacy and Love...



Creating Hope

In 1941, four amazing women Norma Parker, Elvira Lyons, Constance Moffitt and Eileen Davidson, joined together to ask the Archbishop of Sydney to provide support to those most vulnerable in society.

Today, CatholicCare, as the social services agency of the Archdiocese of Sydney, we continue their vision; in creating strong families and connected communities, where everyone can feel supported and a sense of belonging.

At CatholicCare we provide the avenue for individuals and families to live and thrive at every age, irrespective of beliefs and abilities. This has been our aim for over 75 years.

We preserve human dignity, affirming that each person is loved and respected.

Every day we walk in solidarity with individuals, families and communities, to realise our vision of a



Rose Gallagher

society in which we all feel valued and supported.

But we can't do that work alone. It's only through your support that we can continue this important work. Each year CatholicCare gives our blessings and thanks to our supporters who have passed, for their generosity and their everlasting legacy to help others.

Leaving a lasting Legacy

Rose Gallagher was a woman of

faith and of action who has since passed some years ago, but as a CatholicCare supporter was able to leave a lasting legacy. Rose believed in giving young people at risk a helping hand, not a handout. During her life, Rose had a vision to provide young people with the support they needed to succeed in reaching their full potential.

After taking care of her loved ones in her Will, she made a provision that would fulfil her vision well beyond her lifetime.

With Rose's gift CatholicCare created Rose Gallagher cottage, a home for youth leaving the care system, a safe place for them to explore the responsibilities of becoming adults in a supported and nurturing environment.

Your gift will last a lifetime

Your gift will leave a lasting legacy that will mean:

- Children grow up to be resilient and self sufficient
- Individuals are supported in their time of crisis
- Families can create strong bonds to support and nurture each other
- The elderly are not alone

Providing Love

If you would like to learn how a gift in your Will can leave a lasting legacy please contact Thomas Ng, in our Community Engagement team through CatholicCare's CCareline on 13 18 19 or email bequests@catholiccare.org



**“For I know the plans I have for you,
declares the Lord, plans to prosper you
and not to harm you, plans to give you
HOPE and a FUTURE.” Jeremiah 29:11**

CatholicCare is the social services agency of the Archdiocese of Sydney and works with Sydney's most disadvantaged and vulnerable people. To learn how a gift in your Will can leave a lasting legacy, please contact Thomas Ng through CatholicCare's CCareline on **13 18 19**.



A lasting legacy



The expression 'age is just a number' has never been truer than for Vinnies supporter Doreen. With a long history of helping others, at 86 years of age she continues to give to those less fortunate.

"As I say to people sometimes, I'm very blessed because I've got a roof over my head, food in my stomach, and in the mountains a warm bed to get into at night."

Doreen and her husband were both involved with St Vincent de Paul Society NSW, affectionately known as Vinnies for several decades. Doreen worked in Vinnies Shops for more than 30 years, and through Vinnies the two of them would also do home visits.

Home visits are still carried out today by Vinnies volunteers and members, and offer comfort and

support to people struggling to make ends meet. They are also a way for Doreen and her husband to meet people and see what else could be done to improve their situation.

"They'd come into the shop and say 'oh I need some food or I need this, that and the other', and then they would be referred to a Conference member who would visit them in their house. And that was very good because some of them would say that they needed a bit of food, and you'd get to the house and you'd find they had no furniture in it, they were sleeping on a mattress on the floor and that sort of thing, and you'd open the fridge and there'd be nothing there. You'd get an insight into what was really going on."

Doreen has not only spent her life helping others, she is now looking to

make a difference after she has gone so has decided to leave a gift in her Will to Vinnies.

She explains why she is including Vinnies in her Will. "I get the magazine from Vinnies as a donor, and I see what they do at the Matthew Talbot Hostel and the people there, and the women who've been sleeping in cars and all that sort of thing, and I think oh, gosh, you know, if I can help in some way."

Leaving a gift in your Will to Vinnies is a meaningful way to impact the work that they do, from providing food and accommodation, to employing caring caseworkers supporting people along their journey out of homelessness or disadvantage. Doreen's legacy of love will be a gift that helps continue her work well into the future.

If you would like to discuss leaving a gift to Vinnies in your Will, please get in touch with Cherie McKenna for a confidential and commitment-free conversation. Call (02) 8622 0387 or email bequests@vinnies.org.au

How do you want to be remembered?

Make a lasting legacy part of your life story

Leave a gift in your Will that makes a difference to future generations. It's thanks to kind gifts in Wills from our supporters that we've been here for over 185 years, fighting to end poverty and injustice for the vulnerable and disadvantaged members in our community.

Every day, people are helped and lives are enriched by the work of Vinnies in our communities. Meals for the hungry, toys for children, an overnight stay in a shelter for the homeless, or a safe refuge for women and children escaping domestic violence, are just some of the ways that Vinnies is able to give hope to others.

The gift you leave in your Will to Vinnies enables us to continue to help transform the lives of Australian children, families and communities now, and in the future.

A simple Will, free of charge, can be prepared by an Honorary Solicitor when you include Vinnies in your estate plans.



Contact our Gifts in Wills team on (02) 8622 0387 or email bequests@vinnies.org.au to find out how to take advantage of our free Will offer today.



St Vincent de Paul Society
NSW
good works

'Include a Charity'

When there's a will, there's a way to a charity

By Helen Merrick



Writing your will is like fixing a leaky tap. It's something we know we should do, but we don't always get around to doing it.

With Include a Charity Week happening now (7-13 September), it's a good time to think about your will and what you want in it.

While looking after loved ones should always be your priority, it's also worth thinking about the legacy you might leave by supporting a cause you care about.

Many people tell me they think you must be wealthy to leave a gift in your will, but that's not true. Whether your charitable bequest is big or small, it doesn't matter; the organisation you're gifting to will be delighted you want to leave them something.

How do you go about it?

First, decide what charity (or charities) you want to support. We always suggest choosing a cause that you

connect with. This can be a charity that made a difference in your life or one that supported a loved one through a rough time.

Make a list of your favourites

You might consider medical research, humanitarian work, organisations that work to end homelessness or help those with disabilities, animal welfare, the environment, the arts or education. Include a Charity has a list of 80+ charities you can read about at www.includeacharity.com.au

Other helpful tips

- Ask your chosen charity for information about how they use charitable bequests.
- Meet or call their gifts in wills team for a confidential discussion about how your gift can help. They'll explain how your gift will be used, and they'll appreciate knowing your intention.
- Get professional advice or use an established platform before making or revising your will to include a charity.
- If you already have a will, you can have a codicil added about your gift. Often, charities have wording around this that you can use.
- Speak to loved ones about your plans, so they understand and support your charitable goals. This can also help avoid any unpleasant surprises that result in legal challenges to your will.
- Decide whether you tell the organisation about your gift. It's helpful for them to have this information when they're planning future work and because they'll want to thank you.
- If you're worried about being inundated with marketing material, explain how you want the organisation to communicate with you. Include a Charity supporters must abide by a code of ethical best practice around

Types of gifts

RESIDUAL: a residual legacy is a portion of your estate, or the balance remaining after you provide for loved ones, and any expenses are met.

SPECIFIC AMOUNT OF MONEY (also called a pecuniary legacy): it lets you nominate a specific amount of money to leave.

SPECIFIC ITEMS OF VALUE: this includes property, shares, jewellery or artworks that may be specifically named in your will and gifted to an organisation.

WHOLE ESTATE: this is more typical when a person does not have other beneficiaries.

VITAL INFORMATION

A gift in your will must include the correct legal name of the charity and its ABN number, or it may go to the wrong organisation. It's also smart to consider alternatives in case your chosen not for profit should cease operating.

WHERE THERE'S A WILL...THERE'S AN ONLINE PLATFORM TOO

Include a Charity is partnering with Safewill, a reputable online will writing platform, to offer a 50 per cent discount on will writing throughout September. For more information, visit includeacharity.com.au

donor communications.

Sometimes we don't have much money to donate during our lifetime, but by leaving a gift in your will, you can support organisations long after you're gone. And that's an amazing legacy.

Helen Merrick is Director of *Include a Charity*

Lisa demonstrates will-power

Lisa Smith was deep into some bookkeeping work for her husband's carpet cleaning business when a young fundraiser from *Cerebral Palsy Alliance* knocked on the door of her Quakers Hill home.

Surprised that the teenage boy was door-knocking when he could have been spending time with his friends, she decided to give him a few minutes to make his pitch.

"He told me about his younger brother who has cerebral palsy. His face lit up when he spoke about the supporters and the difference that it makes to his brother's life. I was amazed that a teenager was spending his weekend talking to people like me. But he was doing it for his brother, and it was that brotherly bond that hit me," she says.

That was several years ago, and Lisa has been supporting the *Cerebral Palsy Alliance* with monthly donations ever since. She even has plans to do so after she's gone through a gift in her will.

Like many people who have chosen to leave the organisation a charitable bequest, Lisa has no personal connection with cerebral palsy, a physical disability that affects movement and posture. Currently, 40,000 people are living with cerebral palsy in Australia.

But her own experiences with illness (the autoimmune disease sarcoidosis) has given Lisa, who also works part-time as a lawyer, an understanding of how physical disability can affect an individual and their family.

"Our lives haven't been easy. But that strengthens my belief that you



have to help others where you can. The more you can support not just the children, but the family, it just makes it better for everyone."

Lisa and her husband David recently updated their wills to reflect a change in their family circumstances and decided to leave a portion of their estate to the *Cerebral Palsy Alliance*.

"Our son Aaron is looked after, so a little going elsewhere won't affect him. Any gift, large or small, can make a profound and lasting difference to people living with a physical disability," she says.

Lisa was making the comments during *Include a Charity Week*, a social change movement by 80+ charities to encourage support beyond one's lifetime.

CHECK LIST

It's a good idea before making an appointment to prepare your will, to take along as many details about yourself as possible for your Solicitor. Additionally write down your decisions as to the disbursement of your estate. Keep this information along with a copy of your will in a safe place.

1. Your full name	14. Medicare card number
2. Your date of birth	15. Private health insurance details
3. Residential address and contact details	16. Centrelink number and pension type
4. Former address	17. Superannuation details
5. Name of Spouse	18. Veterans Affairs number
6. Names of all children	19. Drivers Licence number
7. Date of marriage	20. Passport number and expiry date
8. Emergency contact	21. Name of account and financial advisor
9. Next of kin and phone number	22. Bank account/s details
10. Name/s of people to act as Executor of your estate	23. Location of House Deeds
11. Funeral director	24. Mortgage details
12. Funeral plan if applicable	25. List of other properties
13. Your funeral arrangements Tax File Number	26. Life Insurance details

DISCLAIMER

The information contained in this booklet is for information only. You should seek your own independent legal advice at all times.

INDEX



When should we write a Will? p4



Types of Gifts in Wills p5



When there's a Will there's a way p20

Caritas Australia.....	p2-3
P: 1800 024 413 E: legacyoflove@caritas.org.au	
Sydney Archdiocese Development & Fundraising Office.....	p6-10
P: 1800 753 959 E: bequests@sydneycatholic.org	
Campion College.....	p12-13
P: (02) 9896 9318 E: foundation@campion.edu.au	
Mission without Borders.....	p14-15
P: (02) 9674 2022 E: australia@mwb.org	
CatholicCare.....	p16-17
P: 13 18 19 E: catholiccare.org	
St Vincent de Paul.....	p18-19
P: (02) 8622 0387 E: bequests@vinnies.org.au	

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a gift in your Will.**

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