



**Your legacy will help
me have a happy
and meaningful life.**

A guide to including Carinya Society in your Will





Carinya Society was founded in response to a need for care and support for those with a disability in the Northern suburbs of Melbourne. Our day service programs have been providing companionship, education, direction, respite, security and unique opportunities to individuals with disabilities since our inception in 1952.

At Carinya Society we care. We want our participants to reach their goals, and we always go the extra mile to ensure that this happens. Our participants are happy, and some have even been with us since we opened over 60 years ago. Carinya Society is a special place for adults with disabilities, where they receive care and support to fulfil their hopes and dreams.

Have you considered leaving a lasting legacy?

A gift in your Will (often referred to as a bequest) is a simple but powerful way that your support for Carinya can live on and on. It's a way of sharing assets – money, property, or valuables – that you may need and use now, but can share when you no longer need them.

Large or small, your gift will be valued greatly and will help us provide our participants with a happy and meaningful life. With the information contained in this booklet, you can go directly to your solicitor and leave your gift in your Will to Carinya Society.

Alternatively, you can complete a Bequest Expression of Interest which is included in this booklet. Returning this form gives you an opportunity, prior to going to your solicitor, to speak to our Fundraising Manager regarding any queries you may have.



"He wakes up in the morning and just can't wait to get there"

Participant's brother



"It's like home away from home for my daughter...they treat her like a human being and not like someone who has a disability"

What does leaving a gift in my Will actually mean?

It means you leave cash or other assets in your Will. It is a simple but influential way to identify the things that are most important to you. It allows you to support causes you care about once you have passed.

For a gift in your Will to be legally enforceable, your Will must be in writing, signed and witnessed.

Why should I consider leaving a gift in my will?

During our lifetime unfortunately many of us are unable to give as generously as we would like due to personal circumstances.

Leaving a gift in your Will is one of the best ways to leave a lasting legacy. It is a gift with the power to transform lives well beyond your lifetime. A pledge of a gift in your Will has no impact upon your present financial situation.

Frequently asked questions

Why make a Will?

Everyone should have a Will. It is a legal document where you say what you want to happen to your estate when you die. If you don't have a Will, your estate may not go to the people you want it to. A Will is one of the most important documents that you will sign in your lifetime.

Do I need a solicitor to make a Will?

You do not have to instruct a solicitor to prepare your Will for you but we strongly recommend it. A solicitor will ensure that your Will complies with the legal requirements to make it valid and achieves what you want overall, not just in relation to any gift you give to Carinya Society.

Will a gift to Carinya Society in my Will really make a difference?

Yes. Whether large or modest, your gift will help us provide adults with disabilities with opportunities for a happy and meaningful life.

How will my gift be used?

Your gift will be used to achieve the greatest impact for adults with disabilities and ensure that they have the opportunity to become a valued and significant member of their community. We'll invest your gift where it's needed most to help ensure our participants receive the level of care and support required to achieve their goals. If you wish for your gift to be used in a certain way, please contact us and we'll do everything we can to fulfil your request.

Is my gift confidential?

Absolutely! Your privacy matters a great deal to us. Any information you give to us remains confidential and is protected by our privacy policy. We do however encourage you to tell your family about your decision to leave a gift to Carinya Society in your Will. It would also be very helpful if you could let us know, if possible, about the gift you plan to give.





Will my gift be tax-deductible?

Carinya Society has deductible gift recipient (DGR) status with the Australian Taxation Office (ATO). This means that your gift will be tax-deductible and not subject to capital gains tax.

Do I need to make a new Will if I decide to add a gift?

It's important your Will is kept up-to-date to reflect your current wishes. If you're happy with the contents of your Will and only want to add a gift or make a minor change, your Solicitor can help you create a Codicil. This can be done without affecting your original Will.

What is a codicil?

A codicil is a legal document that adds to, or partially revokes, or qualifies or otherwise changes an existing Will. It is kept with your Will and read alongside it. A codicil must refer to your Will and be clear that its purpose is to change your Will, not replace it.

It must be signed and witnessed in the same way as a Will to be a valid document. It may not be attached to the Will by a pin or staple. Hand written changes should also not be made to it.

It is not recommended to add more than one codicil. It is better to re-write a new Will if there are additional changes to be made.

Bequests to Carinya Society

Types of Bequests

Your solicitor or trust company can give you more information, but in general there are five major types of bequests:

- Specific Bequests are gifts of particular articles of property, houses or land, shares, cars, furniture, jewellery, artworks etc. given to people or organisations
- General Bequests are usually gifts, sums of money or percentages of the value of your estate given to people or organisations
- Residual Bequests are made up of the remainder of your estate after the Specific and General Bequests have been distributed. You may wish to leave residual bequests to your family or friends or an organisation such as Carinya Society
- Proportional Bequests are those in which you leave a specific proportion of your residual estate e.g. 50 per cent of my residuary estate to Carinya Society
- Alternative Bequests are those in which you make provision in your Will that if any named beneficiary cannot accept your bequest, Carinya Society will benefit.

Whatever amount you bequeath as your personal heritage to Carinya Society, be assured that it will be an enduring tribute to your generosity and care for people with disabilities.



Correct wording for a Will

The following wording is very important. Take this to your solicitor or trustee company when you update or write your Will.

I, _____ of, _____

_____ give and bequeath absolutely to Carinya Society (ABN 59 093 747 454) (or its legal successor in law) the sum of \$ _____

Or
_____ percentage of my estate:
_____ the residue:
_____ or specific item/s

and declare that the receipt of the Chairman, Treasurer or authorised officer of Carinya Society shall be a sufficient discharge to my Executors for my bequest.

Leave a gift in your Will - Expression of Interest

Name _____

Phone number/s _____

Email _____

Street _____

Suburb _____ Town _____ Postcode _____

Preferred contact method _____

Enquiry _____

Please send me a Codicil so I can update my Will

Please return to:
Fundraising Manager,
Carinya Society
PO Box 175,
Pascoe Vale South, VIC 3044

Thank you for your expression of interest, we will be in touch shortly.



telephone
03 9354 3337

www.carinyasociety.org.au



address

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Coburg Victoria 3058

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Pascoe Vale South
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ABN: 59 093 747 454



This booklet has been written for the benefit of our supporters. It is not a legal document and we advise all our supporters to seek legal advice in all matters pertaining to the writing and updating of their Wills. We also encourage all who pledge a gift to Carinya Society in their Wills to consider the needs of their family and loved ones first.