

Checklist for your solicitor

1. Discuss provisions for family members, whether dependant or not. The Leukaemia Foundation understands loved ones comes first.
2. Please ensure the correct wording is used and include our full name: *The Leukaemia Foundation of Australia Limited ABN 57 057 493 017*
3. If you want your donation to be specific to an area or type of blood cancer call us to discuss. The more general the purpose the more flexibility we have to meet the requirements in research and support. The need now may not be the same need in 10-15 years' time. However, your wishes are first and foremost.

Suggested wording for Gifts in Wills

"I give and bequeath free of all duties (here state the amount/percentage or share/residue or assets to be gifted) to THE LEUKAEMIA FOUNDATION OF AUSTRALIA LIMITED ABN: 57 057 493 017 absolutely for the general charitable purposes of the said Foundation and I direct that a receipt of the proper officer for the time being of The Leukaemia Foundation of Australia Limited shall be a good and sufficient discharge to my trustee/s."

This wording can be copied directly from the gift in Will page on our website leukaemia.org.au

Can we help answer any questions you or your solicitor may have?

Please contact:

Emma Dwyer

Gift in Wills Manager

08 8169 6051

giftinwill@leukaemia.org.au

If you have decided to include a gift in your Will, we would love to hear from you. Knowing about these gifts can help ensure your wishes are fulfilled. And most importantly we'd love to the chance to say thank you.

**Leukaemia
Foundation**

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 The Leukaemia Foundation cares about our environment. Please recycle or dispose of thoughtfully.

HONOUR A *Life*
SECURE THE *Future*
CHANGE A *Generation*

Will Planning Checklist

Leukaemia Foundation

**Leukaemia
Foundation**

Thank you for your interest in leaving a Gift in your Will to cure and conquer blood cancer.

Once loved ones are looked after many Leukaemia Foundation supporters are including a Gift in their Will. A gift in your Will is an honourable act of kindness that ensures people affected by blood cancer receive the care and support they need, as and when they need it, and lifesaving breakthrough research continues in the future. All gifts, large and small, change lives and are an important step towards our shared goal of zero lives lost to blood cancer.

Preparing a Will gives a clear guide of how you want your assets distributed and helps reduce any stress and cost to loved ones after you've gone.

It's a good idea to review your Will every few years to ensure it still reflects your wishes. You may need to update if a major change occurs in your life, such as:

- Loss of a loved one
- Marriage, separation/divorce or re-marriage
- Birth of children or grandchildren
- Retirement
- Executor or beneficiaries pass away
- Financial circumstances change

Here is a list of six of the most important points to keep in mind when you write or update your Will.

1. Select your beneficiaries

Think about everything you own (your estate and assets). You can leave these to your loved ones and causes, you are passionate about.

2. Decide on your gifts

There are different types of gifts you can include for your loved ones and causes you're passionate about like the Leukaemia Foundation.

- **A residual gift** - This type of gift is a percentage of your estate and retains its value over time (unlike a specific cash gift, that can reduce in value with inflation).
- **Whole of your estate** - You can leave your entire estate or any part of your estate to Leukaemia Foundation.
- **A fixed sum of money** - Also known as a pecuniary bequest, in the form of a specific cash amount.
- **A fixed specific gift** - A gift in the form of other property such as shares or real estate.

3. Choose an Executor

This is the person who will ensure your final wishes are carried out. Alternatively, if you don't have a suitable nominee, you can select a State Trustee and their fees are paid from the money in your estate.

4. Write your Will

The Leukaemia Foundation recommends engaging a solicitor or State Trustee to write your Will. While there are do-it-yourself Will kits, it is safer to get legal advice to make sure it's a recognised legal document and is appropriate for your needs. A professional can also advise you on any tax issues you need to consider when drafting your Will.

5. Signing

Sign in front of two witnesses who are over 18 years old and not beneficiaries. Make sure each page has your complete signature. Everyone should use the same pen to sign and date the last page.

6. Keeping it safe

Make sure you give your executors a copy of your Will and keep a copy for yourself in a safe secure place. Let your loved ones know about any charitable gifts so they understand your wishes and can assist them being carried out. The Leukaemia Foundation also welcomes the opportunity to connect you and your loved ones with the work of the Leukaemia Foundation so they, too, can understand the value and impact of any future gifts.

