



ST JOHN OF GOD
Foundation

Your Wish, Your Will

Compassion and care
Your gift to your community

Helpful information as you
plan for the future



ST JOHN OF GOD
Foundation

www.sjogfoundation.org.au | T 1800 281 288 | Foundation@sjog.org.au
PO Box 5753, St Georges Terrace, Perth WA 6831



Your Will to make a difference

Thank you for considering how a gift in your Will could support the health of people across Australia now and in the future. Your gift of care and compassion will support people in need our care and reinforce the values that you live by.

We are very grateful for any gift that you choose to make during your life time and we appreciate the opportunity to talk with you about the impact you wish to make. Leaving a gift, or bequest, in your Will can be a way of making a gift that you may not be able to make during your lifetime. Making a gift in your Will is your plan for the future.

St John of God Foundation works to transform health care for humanity, raising funds for vital projects that improve the health of Australians. A gift in your Will can contribute to that goal.

This is a brief introduction to bequests and planning for your future however, we recommend that you seek legal advice before completing your Will.

We hope that you find this useful but in the meantime, please contact me at St John of God Foundation if you would like to talk about your wishes. You can also find more useful information on our website at www.sjogfoundation.org.au/Legacy

Planning for the future

Your Estate is everything you own including things such as real estate, cars, other property, money in your bank accounts, investments, superannuation, etc. Estate planning helps to ensure that your property is distributed the way that you wish, when you want.

An Estate plan should take into account your retirement needs and how you want to distribute your assets after you are gone. It can include your personal objectives and provide for your family and loved ones and causes that are important to you.

Planning long-term and seeking legal or financial advice from a lawyer, trustee, solicitor or other advisor, will help to make sure that your Estate plan can be carried out.



Planning for your Will

Your Will is a legal document which explains how you want your Estate to be given to the people and organisations you care about. It is important that your Will is clear and precise without statements which could be misinterpreted or any wishes which might be difficult to follow.

Being well organised will help ensure that your wishes are carried out, save time and, in some cases, lower the cost of preparing your Will. Here are some things to think about and prepare before you meet with your financial or legal advisor:

1. List your income, investments and property (including life insurance, superannuation, real estate, securities, works of art and all other assets).
2. List the people for whom you want to provide (your beneficiaries), along with their ages, addresses and their relationships to you.
3. List the gifts you want to make to those beneficiaries and explain how you want your property distributed.
4. Name your Executor and an alternate Executor. If you name friends or family members, talk with them first to check that they understand their responsibilities as Executor and are comfortable to take on those roles.
5. If you have children under the age of 18, name a Guardian and alternate Guardian for them and check with those people to be sure they are comfortable with these important roles.
6. List the charitable gifts you would like to make to specific organisations and note if you have particular wishes or if your gifts are to be named in memory of yourself or others.

Once you have a Will, remember that it is important to review it regularly. When your life changes, or your beneficiaries' lives change, you may need to update your Will so that it still reflects your wishes and so that your wishes can be carried out.

What will you leave behind?

More and more Australians are making gifts in their Wills to support the causes and values they believe are important. Often people can make a gift in their Will that they may not be able to afford during their lifetime.

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 people just like you to make an impact with their gift through research, treatments, equipment and facilities. The Foundation is grateful for bequests of all sizes and will work with you to ensure that your bequest achieves your wishes.

How to include a gift to St John of God Foundation in your Will

It's very easy for you to leave a gift to St John of God Foundation that will help your community.

Of course, families come first when you make your Estate plans, but there is usually room in those plans for the causes and charities that matter most to you. If helping to improve the health and wellbeing of Australians is important to you, then leaving a gift for your community through the St John of God Foundation can be a very special way to be remembered.

As you think about the rest of your life and beyond, you can continue to be there and give care and compassion to the people in your community who need your help. Whatever area your gift supports, you have the satisfaction of knowing that you have added to the quality of life for those who live after you.

The impact of your gift – your choice

Whether you choose to make a gift to your community during your lifetime or to leave a gift in your will, we want to follow your wishes whenever we can. Please talk with us if you would like to choose the impact of your gift.

Your 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.

Please let us know of your wishes so that we can help you with the words to describe your wishes and ask your legal advisor to include them in your Will.



Types of gifts

If you decide to make a gift in your Will to St John of God Foundation, you can choose the type of gift you would like to leave and how you would like your gift to be used.

If you wish your gift to be used for a specific purpose, please call us, or ask your legal advisor to call us, so that we can help make sure that your wishes can be met. St John of God Foundation will make every effort to respect your wishes. If situations change over the years and it's not possible to follow your wishes, we will talk with your Executor or family and use your gift for the most relevant related purpose.

An unspecified gift, because of its flexibility, allows St John of God Foundation to meet the needs of the community as they change in the future.

You can make different types of gifts in your Will to St John of God Foundation including:

- a) A residuary gift – what is left of your estate, once all other gifts and costs have been paid
- b) A percentage gift – a specific proportion of your estate once all other gifts and costs have been paid
- c) A pecuniary gift – a gift of a specific amount of money
- d) A gift of assets - gifts of assets such as shares, works of art, property or real estate

St John of God Foundation's legal details

Our legal name: St John of God Foundation

Our ABN: 64 715 901 441

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

Words to use in your Will

There are many different forms of words which can be used to leave a gift in your Will to St John of God Foundation.

The following are samples which can be changed to suit your circumstances.



We are happy to talk with you about a specific form of words however, we cannot give legal advice and a final decision should be made between you and your legal advisor.

Making a bequest to support the health of your community through St John of God Foundation is as simple as including wording such as these:

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] 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.

*** It is very important that you nominate St John of God Foundation Trust as the beneficiary of your bequest to ensure your donation is directed in accordance with your wishes.** If you already have a Will, you can pledge your gift by adding a "codicil" which becomes part of your Will. Your legal advisor can help with the wording.

Take pride in your gift

We encourage you to seek legal advice and to consider your family and loved ones when writing your Will. If you decide to leave a gift to support the



health of your community in your Will, you can be very proud of your intentions and we encourage you to talk to your family so that they understand your wishes and can be proud of you as well.

We hope that this gives you some useful information about planning for your future and to make sure that your wishes are followed. Everyone's financial and family situations are unique so please talk about your plans with your family and legal or financial advisor to work out the best options for you.

Please let us know how you would you like to be remembered

Please let us know if you have decided to leave a gift to health care through the St John of God Foundation so that we can make sure we understand your wishes and how we might acknowledge your gift. We would also like to keep you up to date with our programs and the impact of our work for the community.

**We work with you to follow your wishes so that
your gift has the impact you want.**

Any discussions that we have with you, and your decision to make a bequest, will be kept confidential unless you say otherwise. Thank you again for considering how you would like to make a difference for your community by leaving a gift in your Will to the St John of God Foundation.

We welcome you to call us if you have any questions or if you would like a confidential chat about your wishes, how you would like to be remembered and what you would like to achieve through your Will. Please contact us on 1800 281 288, email Foundation@sjog.org.au. Thank you again for your care and compassion.

**With your help, we can create a lasting legacy of
compassionate care for generations to come.**