



Barnardos
Australia

How to be a Barnardos Big Heart

A guide to leaving a gift in your Will





Every gift, no matter how big or small, will help protect Australia's most vulnerable children from poverty and abuse.

Thank you so much for considering leaving a gift to Barnardos Australia in your Will. A legacy gift is the most powerful way of ensuring that the next generation of children grow up feeling safe, cared for and loved.

We understand that it is important to provide for your family and loved ones first, before making the decision to include a gift in Will to Barnardos Australia.

By leaving in a gift in your Will, you will ensure Barnardos Australia has secure funding for vital programs and services for children well into the future.

Once you've made this incredibly personal decision, this short guide explains everything you need to do to make your wishes clear.



Making a will can seem daunting, but it is actually a very easy thing to do. This guide outlines every step you need to take.

Step 1:

Discuss your decision with your family and loved ones

Although leaving a gift in your Will is a very personal decision, we recommend you let your loved ones know. This will help ensure that your wishes are carried out.

Step 2:

Decide what kind of gift you would like to make

There are four types of gifts you can choose to leave to Barnardos Australia:

A percentage of your estate:

This allows you to decide what proportion of your total estate you would like to give to Barnardos Australia. A percentage gift will also keep up with inflation.

A residual bequest:

This is the remainder of your estate, or a percentage of the remainder, once your loved ones have been taken care of and all expenses have been settled.

A specific amount:

This is also called a pecuniary bequest. You can make a specific bequest by simply specifying the dollar amount in your Will that you wish to leave to Barnardos Australia

An asset:

You may wish to leave Barnardos Australia a specific asset, such as shares, artworks or real estate. If this is the case, we will need your permission to liquidate these assets, so that we can use the funds to support our mission.



Step 3:

Make your Will

Your Will is an important legal document, so you will need to ensure that your paperwork is in order, presented and worded in the right way. A solicitor or the Public Trustee can assist you with this process. We suggest you take the following wording to your solicitor:

I give and bequeath to Barnardos Australia, ABN 18 068 557 906, for its general purposes, "the rest and residue of my Estate" / "a sum of money representing ___% of the value of my residuary Estate" / "the sum of \$____" / "the following specific items_____", free of all duties, and the receipt of the Secretary or other authorised officer shall be a complete and sufficient discharge for the Executor(s).

Your Will must always be in writing, regardless of whether it is handwritten or typed. It must include specific wording, and be signed and dated on each page. Your signature must be witnessed by two people who are not included as beneficiaries of your estate.

When writing your Will, it is a good idea to include any personal requests such as funeral arrangements – for example, donations to charity in lieu of flowers. If these details are in your Will, your executors can ensure your wishes are carried out.

You can store your Will in a 'safe custody' envelope at a bank, or with your solicitor. You may also wish to give a copy to major beneficiaries, family members or loved ones. Always let your executors know where your Will is stored, and make sure you keep a copy for your own records.



Frequently asked questions

Q If I already have a Will, what is the easiest way to amend it to include Barnardos Australia?

You will need to make a codicil to your existing Will. This can easily be organised by contacting your solicitor. You will then need to visit their office to finalise and sign the codicil.

Never amend your Will by crossing something out and writing something different – even if it's just amending a name or an address.

Q Should I keep my Will up to date?

It's a good idea to review your Will every few years to ensure that it accurately reflects your current financial and personal circumstances. For example, you may have become married or divorced, or a beneficiary may have passed away.

Q Is there a kind of gift that Barnardos Australia prefers?

Ultimately, it is up to you to decide what form your gift will take, and we are extremely grateful for whatever you deem appropriate. However, we generally recommend a percentage gift or a residual bequest.

Q Can I leave property or a personal item to Barnardos Australia?

We welcome specific items of value such as jewellery, artwork or property. We will need your permission to sell the items and use the cash funds to support our work.

Q Is my gift tax deductible?

Barnardos Australia is registered as a tax-deductible gift recipient. However, gifts in Will are exempt from Capital Gains Tax. If you would prefer to leave a tax-deductible Living Bequest, please contact us and we would be happy to assist you with this.

Q Can I leave a gift to a specific area of work?

Leaving a bequest for general use is most effective, as it means your donation will be put toward our area of greatest need, at the time the gift is realised.

You may wish to direct your gift to a certain area. To discuss this option, please contact our Bequests Manager on 02 9218 2311 for a confidential conversation.

Q Do I need to tell my family about my decision to leave a gift in my Will to Barnardos Australia?

It is crucial to discuss this decision with your family. This will help ensure that your wishes are carried out.

Q What if I am only able to leave a modest gift?

Barnardos Australia is honoured to have the trust and support of generous people like you. Every gift, regardless of size, makes a difference to young lives and is greatly appreciated.



A [♥]Big Hearted legacy

By including Barnardos Australia in your Will, your legacy will be as a champion for children.

If you have already left a gift in your Will to Barnardos Australia, we would be grateful for the opportunity to recognise your generosity and personally thank you for being a Barnardos Big Heart.

We are happy to answer any questions you may have about leaving a gift in your Will to Barnardos Australia. Please contact our Bequests Manager on (02) 9218 2311, or email bequests@barnardos.org.au