



parkinson's  
australia



# Bequests

# Why leave a bequest?

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Did you know that by leaving a bequest in your Will, you could make a world of difference to over a million people impacted by Parkinson's in Australia? This generous act will help us to advocate for the Parkinson's community on issues of national significance, reduce the impact of Parkinson's by promoting best practice care to ensure that people can maximise their opportunities to live well and maintain their independence.

We're here to answer any questions you might have and we'd love to chat about what we do, our future plans, and how your kind gift could help us reach our goals.

A bequest is more than just a gift - it's a way to create a lasting legacy. It's the act of leaving something special to a person or organisation in your Will. The person or organisation that receives this gift is known as the beneficiary.

If you're considering this generous act and would like more information, please don't hesitate to reach out to us at 0407 703 328 or [info@parkinsons.org.au](mailto:info@parkinsons.org.au). We're always here to help!

The information you may need to make a bequest:

Parkinson's Australia

Trading as Parkinson's Australia Limited

ABN 46 011 714 078

Postal Address

PO Box 256

Unley, SA 5061



# How to leave a bequest

A gift in your Will is a simple and powerful way to provide ongoing support to the causes closest to your heart, after you have looked after the people you care about.

There are many ways you can leave a gift to Parkinson's Australia in your Will. A solicitor or other qualified professional can help make the choice that's right for you.

## **Work out the value of your estate**

The estate includes assets such as property, investments, shares minus any debts.

## **Choose your beneficiaries**

Choose the family, friends, charities or organisations you would like to remember in your will.

## **Consider some of these options**

- Residuary gift - This is what remains of your estate, once other gifts and payments have been made. A residuary gift will keep pace with inflation meaning you are able to choose what proportion of your estate is left to friends, family or charity.
- Pecuniary gift - This is a set amount of money determined by you at the time of making or changing your Will. The value of which may decrease over time due to inflation.
- Specific gift - A gift of a specific item, such as property or shares.

## **Choose your executors**

Appoint the individuals responsible for ensuring that your wishes are fulfilled. They will be named in your will. It's a good idea to name at least 2 people as executors. Before doing so, check they are happy for you to do this. You can name a bank or solicitor as an executor if you wish.

## **Arrange to see a lawyer**

It's important to ask a legal professional to draw up your will to ensure your wishes are properly carried out.

If you don't know any lawyers, ask your friends and family to recommend one. Alternatively, you can contact the Law Council of Australia on Phone (02) 6246 3788 or email [mail@lawcouncil.asn.au](mailto:mail@lawcouncil.asn.au)

Ensure your lawyer uses Parkinson's Australia's correct contact details.  
PARKINSON'S AUSTRALIA LIMITED (ABN 46 011 714 078)

### **Suggested wording:**

#### **Residuary**

"I give all (or ...% of) the residue of my Estate to Parkinson's Australia, for its general purposes. I declare that the receipt of the Chief Executive Officer, Treasurer or other authorised shall be sufficient discharge to my executors."

#### **Residuary legacy for a specific purpose i.e. Research**

"I give all (or ...% of) the residue of my Estate to Parkinson's Australia, for the purpose of research and education. I declare that the receipt of the Chief Executive Officer, Treasurer or other authorised shall be sufficient discharge to my executors."

#### **Pecuniary or specific legacies**

"I give to Parkinson's Australia, the sum of \$\_\_\_\_\_ (or item) for its general purposes free of all duties and taxes payable upon or in consequence of my death. I declare that the receipt of the Chief Executive Officer, Treasurer or other authorised officer shall be sufficient discharge to my executors."

#### **Keep your will safe**

Your solicitor will often look after it for you, but you may wish to retain your own copy too. Tell a relative or close friend where the original copy of your will is stored.

#### **Please notify Parkinson's Australia of your intentions**

If you have already a legacy to Parkinson's Australia in your will, we would appreciate you advising us by sending an email to [info@parkinsons.org.au](mailto:info@parkinsons.org.au).

Not all gifts come from wealthy people – your gift, combined with those from other supporters will make a powerful impact and help support people living with Parkinson's.

\*Disclaimer: Any advice given in this brochure is general advice only, and you will need to rely on your own legal advice.



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