



## Step 1. Make or update your Will

Your Will is an important document that must be properly prepared and executed. We strongly recommend that you seek advice from a qualified professional when writing or amending your Will.

You can search for solicitors in your area via the Law Society NSW. It is best to consult a solicitor who is experienced in Wills and estates. The cost to do this varies significantly, so we recommend that you shop around and get an estimate of fees up front.

The correct wording to leave a gift to Sanfilippo Children's Foundation is listed further below (in purple italics):

Updating a Will:

If you already have a Will, the most cost effective way to include a bequest to the Foundation is by adding a codicil – a short legal amendment to your Will. Check with your solicitor if a codicil is appropriate for the updates you wish to make.

Adding a codicil could be as simple as an email exchange with your solicitor and popping into their office to sign the amendment.

It is important to remember to notify family and loved ones that you are updating your Will – communication will ensure your final wishes are carried out and your gift is received and used as you intended.



## Step 2. Decide your gift

There are four ways you can include the Sanfilippo Children's Foundation in your Will. Your solicitor or financial advisor can advise you on the best gift for you:

1. You can nominate a specific percentage (or all) of your estate to leave to the Foundation.

- This allows your gift to increase as your estate matures.

2. A Residuary Gift: You can nominate to leave what remains in your estate (known as the residue) after you have provided for your family and other beneficiaries.

- This also allows your gift to increase as your Estate matures.

3. A Pecuniary Gift: You can simply specify a fixed amount of money to leave to the Sanfilippo Children's Foundation in your Will – e.g. \$30,000.

- This type of gift will not grow with time and may not be worth as much as at the time you make your Will.

4. You can specify assets such as property, shares, jewellery and/or works of art to us in your Will.

- In this situation the Sanfilippo Children's Foundation will sell the asset to convert it to usable funds.

*'I (insert name here) bequeath to Sanfilippo Children's Foundation, ABN 16 165 855*

*470 for its general purposes (or name a specific purpose, such as research into a specific area)\*, free of all duties.*

*The receipt of the Secretary or other authorised officer from the Sanfilippo Children's Foundation shall be a complete and sufficient discharge for the Executor(s):' [Choose and insert the appropriate statement from the list below]*

- *the whole of my estate*
- *(insert number) percentage of my estate*
- *the residue of my estate*
- *the amount of \$ (insert the value of your gift in cash)*
- *my (insert name of asset)*

\* You can decide whether you want to specify how your gift is used, or simply trust us to put your gift to its very best use.

Most of our supporters chose to include a gift for “general purposes” but it is possible to specify how your gift is spent. To allow us to honor your wishes effectively we would ask you give us a call for a confidential chat.



### **Step 3. Communicate your final wishes**

We believe it is an important step to talk to family and loved ones about your Will – communication will ensure your final wishes are carried out. Let your family know that an enduring gift to the Sanfilippo Children's Foundation is important to you and advise any executors and guardians of your wishes.