How to make a gift in your will to
Mentone Girls’ Grammar School Foundation

We recommend that you use a qualified Estate Planning Lawyer to either prepare or update your Will. Only with a qualified lawyer can you be certain that your Will is drawn up correctly and that all legal rules concerning the construction of a Will are followed.

After you have considered those in your family to whom you have a moral obligation to provide for, there are several different ways you can leave a gift to the School Foundation, such as:

- **a specific gift** – a gift of a valuable chattel or thing (such as real property, artwork or jewellery) that could be sold to support the School Foundation;
- **a monetary gift** – a gift of a fixed sum of money; or
- **a gift of part of your residuary estate** – the residue of your Estate is what is left after all the funeral, testamentary and administration expenses have been paid and any other gifts in your Will are satisfied. You may choose to leave all or part of your residuary estate to the School Foundation.

You could also consider updating the beneficiaries of your Life Insurance Policy so that all or part of the proceeds of your insurance policy can be gifted to the School Foundation.

How you choose to leave a gift to the School will greatly depend on your personal circumstances. However it is important that the wording in your Will reflects your goals. The following are examples of specific wording that we recommend your lawyers use when creating a specific or monetary gift to the School Foundation in your Will. If you would like to leave part of your residuary estate to the School Foundation please consult your legal adviser for the correct wording and structure.

TO MAKE A SPECIFIC GIFT TO THE SCHOOL FOUNDATION

I give my [specific item value] to the Mentone Girls’ Grammar School Foundation Limited (ABN 18 007 310 447) for its general purposes and I DECLARE the receipt of the treasurer or other proper officer for the time being of the Foundation shall be a full and sufficient discharge to my executors or trustees.

If at my death, Mentone Girls’ Grammar School Foundation has ceased to exist or has amalgamated with another charity or has changed its name this gift shall not fail but my executors shall pay it to the charitable organisation, which they consider most nearly, fulfils the objects that I intend to benefit and I declare the receipt of the treasurer or other proper officer for the time being of the Foundation shall be a full and sufficient discharge to my executors or trustees.

TO MAKE A MONETARY GIFT TO THE SCHOOL FOUNDATION

I GIVE the sum of [amount of money] to the Mentone Girls’ Grammar School Foundation Limited (ABN 18 007 310 447) for its general purposes and I DECLARE the receipt of the treasurer or other proper officer for the time being of the Foundation shall be a full and sufficient discharge to my executors or trustees.

If at my death, Mentone Girls’ Grammar School Foundation has ceased to exist or has amalgamated with another charity or has changed its name this gift shall not fail but my executors shall pay it to the charitable organisation, which they consider most nearly, fulfils the objects that I intend to benefit and I declare the receipt of the treasurer or other proper officer for the time being of the Foundation shall be a full and sufficient discharge to my executors or trustees.

CODICILS

If you have an existing Will that you are happy with but you would like to update that Will to leave a bequest to the School Foundation, you may be able to make a formal amendment to your Will by making a Codicil. However a Codicil is a testamentary instrument (like a Will) and accordingly we recommend that you seek also seek legal advice before you make a Codicil.

In all cases, it is important to discuss your Will or Codicil with your lawyer to ensure that your Will or Codicil functions as you would like it to and that it conforms to state laws. Only with a qualified lawyer can you be certain that your Will or Codicil is drawn up correctly and that all legal rules concerning its construction are followed.