

THE

# Gluepot Reserve FOUNDATION

*Ensuring the conservation of our environment for future generations*



## **HOW TO MAKE A BEQUEST TO THE GLUEPOT RESERVE FOUNDATION**

To make a bequest, you must either make a Will, or supplement your existing Will. We recommend that you seek professional legal advice when making your Will, but here are some ways in which you can make a bequest to the **Gluepot Reserve Foundation**:

- With a residual bequest you can provide for your family and friends first and leave what is left (the residue) to the Gluepot Reserve Foundation.
- Leave a percentage or nominated portion of your Estate or of the residue to the Gluepot Reserve Foundation.
- Leave a specific asset such as property (please see note below for gifts of land), shares, paintings, jewellery or anything of value.
- The Gluepot Reserve Foundation can be the beneficiary of a life insurance policy.

You may wish to make a bequest that takes effect after the death of your spouse or other family member; your partner would retain your Estate during their lifetime, after which the indicated portion would be passed on to the Gluepot Reserve Foundation.

Remember that the effects of inflation may, over time, devalue a specific cash sum: this type of bequest needs to be reviewed regularly.

### **The right wording**

Once you have decided on the type of bequest you would like to make, ask your solicitor to draft the appropriate clause. You may use the following wordings as a guide

**'I GIVE AND BEQUEATH [*insert here the details of the bequest*] to the Gluepot Reserve Foundation or its successors for its general purposes and I DECLARE that the receipt of the Treasurer or other proper officer for the time being shall be a full and sufficient discharge to my trustee and my trustee shall not be bound to see to its application.'**

Your gift will be placed into the Gluepot Reserve Foundation, a capital-preserved fund that will underpin Gluepot Reserve's preservation and enhancement of the Gluepot environment into perpetuity, thus providing long-term security for the Reserve.

### **Changing your Will**

If your existing Will is satisfactory but you would like to include a bequest to the Gluepot Reserve Foundation, you can add a codicil that must be signed and witnessed the same way as your Will. Always seek legal advice when changing your Will.

### **Bequest of land to the Gluepot Reserve Foundation**

If you wish to make a gift or bequest of land to the Gluepot Reserve Foundation (as distinct from other realisable assets), we very strongly recommend that you contact us first to discuss your wishes.

## **Making a Will is important**

Everybody needs a Will. A clearly written and up-to-date Will is the only way that you can be absolutely certain that your Estate will be distributed according to your wishes. You can provide security for your family and friends, and at the same time take the opportunity to further support the causes that have been most important to you during your lifetime.

Making a Will does not need to be complicated or costly. While it is possible to prepare your own Will, to be sure that it reflects your exact intentions and that you fully understand the tax implications of your Estate decisions, we strongly recommend that you seek advice from a qualified solicitor or trustee. The Law Institute or Society in your State can advise you of a solicitor trained in the area of Wills and Estates.

You can change your Will whenever you like, and it is wise to review it every few years to ensure that it still reflects your wishes. You should always seek legal advice when changing your Will.

## **Please let us know**

We understand that making your Will is a very personal matter. But if you have already remembered the Gluepot Reserve Foundation in your Will, or are considering doing so, it is a great help to our future planning if you let us know. Advising us of your bequest enables us to thank you personally, and provides the opportunity for you to discuss with us the ways in which you would like your gift to be used.

Alternatively, you may ask your solicitor to inform us on your behalf.

Please be assured that any bequest information passed on to the Gluepot Reserve Foundation, will be held in the utmost confidence.

## **Further information**

For further information about making a bequest to the Gluepot Reserve Foundation, or any other aspect of our work, please contact our Chairman, Ian Falkenberg, for a confidential discussion:

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Chairman  
Birds Australia Gluepot Reserve  
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Nuriootpa. SA. 5355  
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## **Or, contact the Gluepot Reserve Foundation:**

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Gluepot Reserve Foundation  
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