

Suggested clauses to include in your will

SPECIFIC LEGACY

I give and bequeath to Melba Support Services Inc. of Ormeau Road, Mount Evelyn, Victoria the sum of \$.....[insert sum] free of all duties and taxes payable upon or in consequence of my death and I declare the receipt of the Treasurer or other proper officer for the time being of that organisation shall be a full and sufficient discharge to my Trustees.

DEVISE OF PROPERTY

I give devise and bequeath to Melba Support Services Inc. of Ormeau Road, Mount Evelyn, Victoria the property known as [insert property details] or any interest I have in the said property at my death and I declare the receipt of the Treasurer or other proper officer for the time being of that organisation shall be a full and sufficient discharge to my Trustees.

RESIDUARY ESTATE

I direct my Trustees to pay or transfer my residuary estate to Melba Support Services Inc. of Ormeau Road, Mount Evelyn, Victoria and I declare the receipt of the Treasurer or other proper officer for the time being of that organisation shall be a full and sufficient discharge to my Trustees.

RESIDUE – PERPETUAL CHARITABLE TRUST

1. I give all my real and personal property not otherwise disposed of by my will to my Trustees upon trust for sale with power to postpone the sale of the whole or any part of the said property (including property of a wasting nature) and from the proceeds of sale I direct my Trustees to pay all my just debts funeral and testamentary expenses and all taxes and duties charged on my estate or occasioned by my death and the balance remaining is herein called “my residuary estate”.

2. I direct my Trustees to stand possessed of my residuary estate as a charitable trust fund (in this clause called “the trust fund”) and to hold the same subject to the trusts hereinafter declared and in respect of the trust fund:-

(a) I hereby declare that it is my intention that the trust fund be used or applied for the general benefit of Melba Support Services Inc. of Ormeau Road, Mount Evelyn, Victoria;

(b) Subject to my charitable intention as declared in sub-clause (a) above I direct my Trustees to hold the trust fund upon trust in perpetuity and to invest the same and dispose of such of the income derived therefrom as my Trustees shall from time to time determine to Melba Support Services Inc. and any income not so disposed of shall accrue to and become part of the capital of the trust fund and my Trustees may in their discretion apply any income so capitalised as income in a later year thereby reducing the capital of the trust fund;

(c) Subject to sub-clauses (a) and (b) above it is my wish (but without creating or imposing any legal or equitable obligation) that my Trustees use their discretion to apply the whole of the income of the trust fund towards the promotion and financial support of [set out any favoured charitable purposes];

3. It is my desire that all benefits provided out of the trust fund and all works or other things undertaken or established out of the trust fund be in memory of [insert name of person in memoriam]

4. The receipt of the Treasurer Secretary or other proper officer of the organisation shall be a full and sufficient discharge to my Trustees.

Please note : in all of the above clauses you can specify for what charitable purpose you would like the funds to be used by Melba Support Services Inc.

 **melba**
SUPPORT SERVICES
Individuals with a disability leading everyday lives

ABN: 39 848 842 276

PO Box 316 Mount Evelyn VIC 3796

Telephone: (03) 9760 8200

Facsimile: (03) 9376 2224

Email: melba@melbasupport.com.au

Website: www.melbasupport.com.au

Invest in someone's future!



Leave a meaningful legacy

Leaving a meaningful legacy

For many people moving towards older age, thoughts of how our life might have influenced or helped others is common.

Did I live a good life? Will my life leave its mark on the world in some meaningful way after I've gone?

For those of us with children, we know that they will go on in our image when we die, so it's natural that we would want to leave them some kind of parting gift to help them on their journey.

But many of us also see other people in need, through no fault of their own, and want to help them as well.

And so we wonder how to do this without disenfranchising our own family.

Well this brochure is about how you can assist your family and the people that Melba supports.

Why Wills and Bequests?

For many people, the lack of disposable income during their lifetime often limits their capacity to financially support their own family in the way they would like, let alone a favourite cause, or other people in need.

But specifying a special gift for someone or something in your Will, (also known as leaving a bequest or a legacy) is a way of providing ongoing and lasting support when you no longer have the need for personal money, assets or belongings.

Leaving gifts in your Will can take many forms, such as:

- Dividing up your money and gifting a variety of amounts to various people or causes that are special to you
- Dividing up the proceeds from the sale of your house or properties and gifting a variety of amounts to various people or causes that are special to you
- Dividing up your investments and gifting a variety of amounts to various people or causes that are special to you

Why Perpetual Trusts?

Some people have chosen to have Perpetual Trusts set up in their name.

This is where a person's entire estate (such as a house, investments, jewellery, art, furniture and cash) is turned into cash to be put into a Perpetual Trust, which is then invested annually by a trusted and ethical person or organisation, so that its capital earns interest annually, which is in turn dispersed amongst your nominated beneficiaries.

This ensures that your name and funds can keep on giving to others in need forever.

Why make a Will?

The only way to guarantee that your wishes are followed exactly after you die is to write them down in a legal Will, and appoint an executor of your choice to administer it. This could be a family member, friend or solicitor.

People who die without having a legal Will have their estates divided up by the State according to rigid legislation, which may or may not fall into line with what they want.

What's more, people who don't have family or distant relatives could have their estates ending up in the hands of the government of the day.

Regardless of which way you choose to leave your worldly goods, you have the power to invest in someone's future with the stroke of a pen by having your own legal Will.

To borrow another person's words, "What we have done for ourselves alone dies with us. What we have done for others and the world remains and is immortal."

Who can I talk to?

If you already have a solicitor, ask him or her for advice. Otherwise, the Law Institute of Victoria has a list of Specialist Accredited solicitors who have demonstrated a high degree of skill and knowledge in the area of Wills and Estates. This is a free list and can be obtained by visiting www.liv.asn.au (click on 'Getting Legal Advice', then 'Accredited Specialists', then 'Wills and Estates') or by ringing (03) 9607 9550.

Alternatively, should you wish to learn more about the work of Melba Support Services, and how a gift to Melba in your Will would help its future, please call Melba's Chief Executive Officer, Jim Burns, on (03) 9760 8204.

Why leave a gift to Melba Support Services in a Will?

Melba Support Services Inc is a not-for-profit community based organisation that supports people who live with a disability to connect with their chosen communities and to lead the lives of their choice.

Established in the early 1970s by a group of parents in Melbourne's

Outer Eastern suburbs who were concerned by the lack of support for their children with disabilities in their local areas, Melba now provides a range of community services covering such areas as:

- Support to live in the community in shared supported accommodation
- Provision of practical support in everyday living skills
- Assistance in pursuing and accessing vocational, educational, employment and recreational goals
- Respite care that provides planned breaks for carers
- Assessing communications difficulties and sourcing practical solutions

These types of services are designed to give people with disabilities greater independence and control over their own lives.

Partially funded by government, Melba still needs to rely on the wider community for additional financial support as well as in-kind support to remain operating at the levels expected of it.

Leaving a gift to Melba Support Services in your Will allows Melba to continue to provide lasting support to the people who need it.

