



CatholicCare  
383 Albert Street  
East Melbourne  
VIC 3002  
T: (03) 9287 5555  
E: fundraising@ccam.org.au  
W: ccam.org.au

# How to include CatholicCare in your Will

## Correct Wording

Using correct wording and terminology ensures that your wishes are carried out as you intended. Please use the following wording in your Will to ensure that your gift to CatholicCare is valid and able to make lasting changes to those less fortunate. Just select the most relevant option according to how you wish to include us. If you use wording other than that provided, please ensure you indicate our full name:

**CatholicCare Archdiocese of Melbourne**  
**ABN 42 795 179 778**  
**383 Albert Street, East Melbourne, Victoria**

### OPTION A

*This is to enable you to give a specified percentage of your residuary estate to CatholicCare. You can either leave a gift for general purpose, or you can allocate your bequest for a stated purpose where you specify the particular initiative to benefit, such as a program or service.*

My trustee is to hold the residue of my estate on the following trusts:

(i) \_\_\_\_\_ percent, free of all duties and taxes for **CatholicCare Archdiocese of Melbourne, ABN 42 795 179 778 of 383 Albert Street, East Melbourne, Victoria.** My bequest is to be used for the general purposes of CatholicCare....

(ii) \_\_\_\_\_ percent, free of all duties and taxes for **CatholicCare Archdiocese of Melbourne, ABN 42 795 179 778 of 383 Albert Street, East Melbourne, Victoria** for <insert purpose>....

....and I declare that the receipt of the director, secretary or public officer shall be a complete discharge to my bequest.

### OPTION B

*This is to be used when you have first made specific bequests to others, and then wish to give the balance of your estate to CatholicCare.*

"Subject to the preceding provisions of my Will, I give, free of all duties and taxes, to **CatholicCare Archdiocese of Melbourne, ABN 42 795 179 778 of 383 Albert Street, East Melbourne, Victoria** absolutely the residue of my estate. My bequest is to be used for the general purposes of CatholicCare and I declare that the receipt of the director, secretary or public officer shall be a complete discharge to my bequest"

### OPTION C

*This is if you wish to give your entire estate after payment of all debts and estate administration expenses, to the work of CatholicCare.*

"I give, free of all duties and taxes, the residue of my estate to **CatholicCare Archdiocese of Melbourne, ABN 42 795 179 778 of 383 Albert Street, East Melbourne, Victoria.** My bequest is to be used for the general purposes of CatholicCare and I declare that the receipt of the director, secretary or public officer shall be a complete discharge to my bequest"

### OPTION D

*This is to give a specific sum to CatholicCare.*

"I give the sum of \$ \_\_\_\_\_ free of all duties and taxes to **CatholicCare Archdiocese of Melbourne, ABN 42 795 179 778 of 383 Albert Street, East Melbourne, Victoria.** My bequest is to be used for the general purposes of CatholicCare and I declare that the receipt of the director, secretary or public officer shall be a complete discharge to my bequest"

### OPTION E

If you do not wish to rewrite your Will, you can complete and attach a Codicil to your existing Will.

## VALUE OF LEGAL ADVICE

When you make a Will or update your existing Will, it is always advisable to seek legal advice from a professional. Your solicitor can advise you on tax matters such as trusts, guardians, asset valuation and power of attorney.

## NEXT STEPS

After the Will or Codicil (if you have amended your current Will) is made, could you or your legal adviser provide CatholicCare with either a copy of your Will or details of the relevant provision, the date of execution, and name and address of the executor/s. If you subsequently make any changes to your Will which affects your bequest, could notify CatholicCare as soon as possible.