

LET'S TALK ABOUT WILLS

Your pocket guide to Bequests.



St Vincent de Paul Society
(TASMANIA) INC

good works

THANK YOU FOR CONSIDERING A BEQUEST TO THE ST VINCENT DE PAUL SOCIETY TASMANIA (INC.)

Since 1899, the St Vincent de Paul Society (TAS) Inc (affectionately known as Vinnies) has been advocating for all Tasmanians experiencing disadvantage; as well as providing food, clothing, furniture, shelter, budget support and referral, and homeless services.

Consequently, for 120 years, Vinnies has relied on the generosity of our wonderful donors and supporters who have included a charitable gift to us in their Will.

A gift in your Will, no matter the size, can make a profound difference to the lives of Tasmania's most vulnerable and disadvantaged.

OUR MISSION

The St Vincent de Paul Society is a lay Catholic organisation that aspires to live the gospel message by serving Christ in the poor with love, respect, justice, hope and joy, and by working to shape a more just and compassionate society.

OUR VISION

The St Vincent de Paul Society aspires to be recognised as a caring Catholic charity offering “a hand up” to people in need. We do this by respecting their dignity, sharing our hope, and encouraging them to take control of their own destiny.

OUR KEY VALUES

Commitment

Loyalty in service to our mission, vision and values.

Compassion

Welcoming and serving all with understanding and without judgement.

Respect

Service to all regardless of creed, ethnic or social background, health, gender or political opinions.

Integrity

Promoting, maintaining and adhering to our mission, vision and values.

Empathy

Establishing relationships based on respect, trust, friendship and perception.

Advocacy

Working to transform the causes of poverty and challenging the causes of human injustice.

Courage

Encouraging spiritual growth, welcoming innovation and giving hope for the future.

YOUR WILL IS IMPORTANT

Your Will is one of the most significant documents you will ever prepare.

Your Will will enable you to:

- Name an executor
- Arrange for guardianship of young children
- Make burial or cremation arrangements
- Divide your estate between family, friends and charitable organisations such as the St Vincent de Paul Society.

Having a Will that clearly states your wishes brings peace of mind, security and certainty for the future. It is important to review your Will every few years, particularly if your circumstances change through marriage, divorce, the birth of a child, or the purchase or sale of property.

Vinnies recommends seeking advice from an estate planning professional such as a trustee company or your solicitor when preparing your Will. If you already have a Will but wish to include a charitable bequest to the St Vincent de Paul Society, a codicil to your Will is a simple way for your estate planning professional to make these amendments.

You may not be in a position to give now, but by arranging a charitable gift in your Will, you can support a cause close to your heart whilst still providing for family and friends in the future.

VINNIES IN TASMANIA

Our programs in Tasmania assist men, women and children experiencing financial and personal hardship.

On any given day, we receive over 100 calls from Tasmanians seeking our assistance. When you include a charitable bequest in your Will, you can help us continue our core work of Home Visitations* and providing Emergency Relief assistance through food, furniture, clothing, assistance with budget support and referral, along with friendship and support.

Beyond Emergency Relief assistance, we have other specialised support services and programs including retail and distribution centre operations, services to prevent or alleviate homelessness (including food vans) and programs for young people. Each of our service areas aim to help people break the cycle of homelessness and disadvantage.

**Home Visitations are carried out by individuals who join a St Vincent de Paul Society group in their local area called 'conferences'. All conference members are volunteers who meet on a regular basis to determine how best to assist people in need. Members then visit people in their homes and provide practical assistance to help get them back on their feet.*

YOUR GIFT, YOUR CHOICE

A charitable gift in your Will is a wonderful way to support a cause close to your heart without costing you during your lifetime.

Below are some of the ways you can support Vinnies in your Will:

- **Whole or part of your estate** – you can leave your entire estate or a portion of your estate to the St Vincent de Paul Society
- **Residual gift** – once debts are paid and specific gifts are disbursed, you can leave the remainder, or a percentage of the remainder, of your estate to the St Vincent de Paul Society
- **A specific gift** – you can leave specific gifts such as real estate, shares, vehicles, jewellery or art.
- **Pecuniary bequest** – a fixed amount of money bequeathed to the St Vincent de Paul Society.

You may wish to specify in your Will how you would like us to use your gift, otherwise we will direct it towards our service area in need at the time your bequest is realised.

If you are considering leaving a gift in your Will to Vinnies, we encourage you to talk with your family and let them know of your intentions.

DEFINITIONS

BENEFICIARY

A person who benefits under a Will.

BEQUEST

A gift of an asset under a Will, also known as a legacy.

CODICIL

A written amendment to an existing Will. A codicil can add to, subtract from or modify the terms of the original Will.

ESTATE

The assets and liabilities of a person.

EXECUTOR

A person or organisation entrusted by the Will-maker to carry out the provisions of their Will.

INTESTATE

A person that dies without leaving a valid Will.

LEGACY

A gift of an asset or cash under a Will, also known as a bequest.

PROBATE

The document issued by the Supreme Court on determining that a deceased person's Will is their last valid Will entitling the named executor(s) to administer the estate accordingly.

TESTATOR

A person making a Will (Will-maker).

WILL

A document providing for distribution of a person's estate on death.

WILL-MAKER

A person who makes a Will (testator).

FOR YOUR ESTATE PLANNING PROFESSIONAL

We suggest you take the following information with you when you visit your estate planning professional to draft or update your Will.

WORDING FOR YOUR WILL

GIFT IN GENERAL


I bequeath to St Vincent de Paul Society (TAS) Inc. (**ABN** 41 003 138 898) the entirety (or%) of the residue of my estate, after payment of all my just debts, fees, charges, taxes, duties, funeral and testamentary expenses payable at my death, for its general purposes (or for the specific purpose of[insert specific purpose]); and I direct that the receipt from the Chief Executive Officer, President or any other proper or authorised officer of St Vincent de Paul Society (TAS) Inc. is a full and sufficient discharge to my Executor and Trustee who is not bound to see to the application of this bequest.

GIFT OF CASH

I bequeath to St Vincent de Paul Society (TAS) Inc. (**ABN** 41 003 138 898) the sum of \$.....from my estate for its general purposes (or for the specific purpose of [insert specific purpose]); and I direct that the receipt from the Chief Executive Officer, President or any other proper or authorised officer of St Vincent de Paul Society (TAS) Inc. is a full and sufficient discharge to my Executor and Trustee who is not bound to see to the application of this bequest.

GIFT OF PROPERTY

I bequeath to St Vincent de Paul Society (TAS) Inc. (**ABN** 41 003 138 898) my real property situated at [address] in [State & country] free of all fees, charges, taxes, duties and encumbrances, for its general purposes (or for the specific purpose of[insert specific purpose]); and I direct that the receipt from the Chief Executive Officer, President or any other proper or authorised officer of St Vincent de Paul Society (TAS) Inc. is a full and sufficient discharge to my Executor and Trustee who is not bound to see to the application of this bequest.

A woman with long blonde hair is shown in profile, sitting in a chair. She is wearing a grey and white patterned sweater and has her hands clasped near her chin, looking thoughtfully out of the frame. The background is a simple, dark wall with a white vertical element on the left.

LET US DO WITHOUT HESITATION WHATEVER
GOOD LIES AT OUR HANDS.

FREDERIC OZANAM

WE WOULD LOVE TO HEAR FROM YOU

If you have included a bequest to the St Vincent de Paul Society in your Will, we would love for you to let us know, so we can thank you now.

If you choose not to disclose your bequest to us, we respect your privacy and wishes. Please accept our sincere and heartfelt thanks for your generous gift that will have a profound effect on so many lives in the future.

For a confidential discussion about your wishes, please contact our office on **03 6333 0822** or email **bequests@vinniestas.org.au**



NEVER BELIEVE THAT A FEW CARING PEOPLE
CAN'T CHANGE THE WORLD. FOR, INDEED, THAT'S
ALL WHO EVER HAVE.

MARGARET MEAD

CONFIDENTIAL REPLY FORM

First Name

Surname

Address

Phone

Email

Date of birth

- I have left a gift to Vinnies in my Will.
-
- I intend to leave a gift to Vinnies, but have not yet updated my Will.
-
- Please send me more information about Vinnies and including a gift in my Will.
-
- I would like to be contacted by TPT Wealth about creating a Will.
-
- Please send me information about Wills and Estate Planning.
-
- Please add me to the Vinnies e-newsletter list using my email above.
-

NOTES



TPT

WEALTH

Offering peace of mind for generations of Tasmanians for over 130 years in Estate Planning and Trustee Services.



Preparation of Wills and Powers of Attorneys, new and revised



Administration of Deceased Estates and Trusts

Speak to our expert team today: **1300 138 044** | tptwealth.com.au



St Vincent de Paul Society
good works

For further information
or donations please contact us

03 6333 0822

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TPT Wealth and Flying Colours Group are pleased to support Vinnies in the production of this booklet.