



**Glaucoma
Australia**
Saving sight

Practical information on leaving a gift in your Will

Every gift, no matter its size, is a legacy that can help save sight

Thank you for considering leaving a gift to Glaucoma Australia in your Will. It is the most powerful way you can support our sight-saving work, and help prevent glaucoma blindness in the next generation.

We understand that it can be important to provide for your family and loved ones first before reflecting on whether you can also include a gift in your Will to Glaucoma Australia. Once you've decided to leave a gift in your Will, this short guide explains what needs to be done to make your wishes clear.

Making a Will can seem daunting, but it doesn't have to be. This step-by-step process will help you along the way.

Step 1: Speak to your family and loved ones

This is a personal decision for you to make, but we recommend letting your loved ones know that you are planning to leave a gift in your Will.

Step 2: Decide what kind of gift to leave

There are three main ways to make a Gift in Will to Glaucoma Australia.

1. A residual bequest

You can make a gift of the residue (or remainder), or a percentage of the residue, of your estate once specific gifts and expenses have been taken care of.

2. A specified amount

You can make a specific bequest by simply stating the dollar amount in your Will that you wish to leave to Glaucoma Australia.

3. An asset

You may wish to make a gift of a specific asset, for example real estate, shares or bonds.

Step 3: Choose your executor

You should choose between one and four people who will be able to ensure your wishes are carried out. You can choose your bank manager, solicitor, friends or relatives. In the absence of a suitable executor, we would recommend you get in touch with your local Public Trustee to appoint them as executor.

Step 4: Get the help of a professional

Your Will is an important legal document and a solicitor or Public Trustee can help you ensure that your paperwork is in order and presented in the right way. We have included suggested wording in this book, which you can take to your solicitor for guidance. The cost of seeing a solicitor varies depending on who you see, however it is a small price to pay for the reassurance that your wishes will be carried out.

Step 5: Make your Will

Your Will must be in writing (handwritten, printed or typed) and include specific wording. It must be signed and dated on every page. Your signature must be witnessed by two people who are not named as beneficiaries of your estate. They both need to sign their own name on every page of your Will. Your solicitor will be able to assist you.

Personal requirements

Make note of your funeral arrangements and any specific requests. If, for example, you'd prefer donations to your favourite charities rather than floral tributes at your own funeral it's a good idea to state that preference in your Will so your executor can ensure your wishes are carried out.

Step 6: Keep your Will in a safe place

Store your Will in a safe place and let your executor know where it's stored. You can lodge it with a bank in a 'safe custody' envelope or with a solicitor. You may want to send a copy to major beneficiaries, family members and your executor. Be sure to keep a copy for yourself.

Step 7: Tell your loved ones

Share the news of your decision with close family, and make sure they understand your wishes as well as the location of your Will. Wherever you choose to store your Will, it's vital to tell the people who matter most to you where to find it.

How to amend an existing Will

If you have already written your Will, the easiest way to make a gift to Glaucoma Australia is to add a codicil – a short legal amendment – to your Will.

This can be organised with a phone call or email to your solicitor, followed by a visit to their office to finalise the amendment and sign the codicil.

Never change your Will by simply crossing something out and writing something different. This includes changes to names and addresses.

Keep your Will up to date

You should review your Will every few years to ensure that any major changes in your financial and personal circumstances are accurate and that your Will still reflects your wishes. For example, there may be a change in your relationship such as marriage or divorce, or death of a beneficiary.



Suggested wording

Please take this information with you when you visit your solicitor to draft or update your Will. We suggest the following wording:

EITHER

1

Leaving us the residue of your estate

“I give and bequeath to Glaucoma Australia Incorporated (ABN 52 610 716 720), in aid of that Association and for its general purposes, the rest and residue of my Estate, for which the receipt of the Executive Officer shall be sufficient discharge to my Executor for the Bequest.”

OR

2

Leaving us a percentage of your estate

“I give and bequeath to Glaucoma Australia Incorporated (ABN 52 610 716 720), in aid of that Association and for its general purposes, a sum of money representing _____% of the value of my Estate as at the date that my Estate is distributed, for which the receipt of the Executive Officer shall be sufficient discharge to my Executor for the Bequest.”

OR

3

Leaving us a specific amount

“I give and bequeath to Glaucoma Australia Incorporated (ABN 52 610 716 720), in aid of that Association and for its general purposes, the sum of \$_____ or the following specific item/s _____ for which the receipt of the Executive Officer shall be sufficient discharge to my Executor for the Bequest.”

Frequently asked questions

What is the best way to leave a gift in my Will to Glaucoma Australia?

Ultimately, the decision is yours and we are extremely grateful for whatever you consider to be appropriate. However, we generally recommend a residual bequest. This means that after your family and loved ones are looked after and your debts are settled, whatever is remaining will be left to Glaucoma Australia to continue funding our education, awareness and glaucoma research programs.

Can I leave my property or a personal item to Glaucoma Australia?

Yes, we welcome specific items of personal property provided we're given permission to sell the item and use the cash funds to support our vital work.

Is my gift tax deductible?

Glaucoma Australia is registered as a Deductible Gift Recipient. However, Gifts in Will are exempt from Capital Gains Tax. If you would prefer to leave a Tax Deductible Living Bequest, please contact us and we will be happy to assist.

Can I leave a gift to a specific area of work?

Leaving a Gift in Will for the organisation's general use is most effective as it means that your donation will definitely be used where it's needed most.

It is sometimes possible to direct your gift to certain areas. Please call our CEO on 1800 500 880 or email ceo@glaucoma.org.au if you would like to discuss your personal wishes further.

Do I need to discuss my decision with my family?

It is extremely important that you discuss your decision to leave a gift in your Will to Glaucoma Australia with your family and loved ones. This will help ensure that your wishes are carried out.

My gift is only modest, does that matter?

Glaucoma Australia is honoured to have the trust and support of people like you. Every gift, no matter how small or large, makes a difference and is greatly appreciated.





The generosity of supporters like you who have left a gift in their Will helps fund our awareness, education and research programs today that will save sight tomorrow.

A legacy of kindness, a legacy of vision

By including Glaucoma Australia in your Will, you will help give the gift of sight to the next generation. Your legacy will live on in the sight-saving work of Glaucoma Australia.

We would be grateful for the opportunity to recognise your gift and celebrate your generosity by personally thanking you. If you choose to tell us about your gift, you will also become a Glaucoma Australia Giver of HOPE.

Contact us

We are happy to answer any questions you may have about leaving a gift in your Will to Glaucoma Australia.

Please contact our CEO
on 1800 500 880 or
ceo@glaucoma.org.au



Glaucoma Australia

Saving sight



1800 500 880



glaucoma.org.au



PO Box 420 Crows Nest NSW 1585

ABN 52 610 716 720



ORGANISATIONAL
MEMBER
CODE COMPLIANT

