

A gift to help others tomorrow

LEAVING A BEQUEST TO THE BENEVOLENT SOCIETY



*A gift in your Will is a
life-affirming promise
made today to help
others tomorrow*





A MESSAGE FROM THE CEO

From its earliest beginnings in 1813, The Benevolent Society has responded to those in need. We have a rich history of providing social and community services such as Australia's first maternity hospital and children's health clinics, adoption services, aged care services, and legal aid programs. We also played an important role in the introduction of the age pension and legislation to protect children.

The Benevolent Society continues to work with children at risk, families in crisis, women experiencing domestic violence, older people and carers. We're also encouraging community and corporate leaders to look at how they can address social challenges in their own communities.

Without the support of our donors we would not be able to carry out the vital work that we do and I am particularly grateful to those who have chosen to leave a gift in their Will. Such an enduring gesture enables us to continue to support people in need well into the future.

If you are considering leaving a bequest to The Benevolent Society in your Will or if you have already done so, I thank you.

Yours sincerely



Richard Spencer
Chief Executive Officer
The Benevolent Society

*“The support I received from
The Benevolent Society through
the toughest times helped me
see that there is a light at the
end of the tunnel”*



A LIFE AFFIRMING PROMISE FOR TOMORROW

Our vision is to make a long-term difference by inspiring people to create positive change for themselves. Including The Benevolent Society in your Will puts you at the heart of that vision, giving us the opportunity to extend our reach, to trial new ways of improving lives and to advocate for change.

Bequests, both large and small, have enabled us to work to give children a good start in life, to help women rebuild their lives after domestic violence, to support older people to lead full and meaningful lives, and to build healthy and connected communities.

Recent bequests have changed lives and built stronger foundations.

They have, for example:

- **strengthened** our child protection work, to ensure vulnerable children get the support they need to overcome trauma, build resilience and look forward to a brighter future
- **continued** a special after school club for disadvantaged kids, who have fallen behind at school because of a chaotic life at home, so they can get back on track with their learning
- **extended** the opportunity to plan ahead for innovative projects, such as our Apartments for Life initiative, a ground breaking housing solution for older Australians.

SYD TELLS HOW THE BENEVOLENT SOCIETY HELPED TO CHANGE HIS LIFE

I first came into contact with The Benevolent Society 48 years ago when my wife and I decided to adopt children and after a close relative suggested the Society as a possible help in achieving our aims. In due course we adopted a girl and two years later a boy, both just a few days old when coming into our lives.

The following years were devoted to raising the children in what was a normal and happy environment. Family relationships are close, continuous and now include 3 grandchildren, a boy of 14 and twin girls aged 11.

During my long and unbroken association with The Benevolent Society over nearly 5 decades, I have met senior and operational managers and accepted invitations to visit various centres run by them. Annual Meetings and other events have also been attended whenever possible. I have generously been accepted as a member of the Society, a Life Governor and a Member of the Benevolent Circle, in turn accepting the responsibilities that go with these appointments and enjoying the benefits involved.

The tasks of The Benevolent Society, and like charities, have today become massive and important to the community. One wonders whether without them, the costs and logistics of the services provided would be affordable or even measurable by governments or taxpayers.

In ever increasing numbers, those in modern society at risk or serious need seem to be on a scale unknown in earlier

days, and is sometimes alarming, if not frightening. This is particularly so as we generally have been living for such a long time in circumstances of affluence not seen before.

So years ago as a mark of thanks and gratitude, I included The Benevolent Society in my Will, a gift given on behalf of all my family. This bequest is provided with my utmost confidence in the dedicated, competent people working at all levels of the Society, to manage and apply the proceeds in achieving The Benevolent Society's aims so clearly stated in more recent times.



Syd and his wife with their children and grandchildren

A SHARED VISION

For nearly 200 years, The Benevolent Society has recognised the importance of community. We understand that when people belong, they feel they have worth. We know our bequestors share our vision, and that's why people include us in their Will.



As one bequestor, Holly, says,

"I have put The Benevolent Society in my Will because they work in so very many ways to help and empower disadvantaged people, from the very young to the elderly, and help them in practical ways so they can become happy and productive members of society."

If you have any questions about leaving a bequest to The Benevolent Society, or about our work generally, please contact:

Karen Miller
Fundraising Manager
The Benevolent Society

Tel: 1800 819 633

karenm@bensoc.org.au

*Bequests help us to build hope, transform lives
and make an impact on future generations.*

SAMPLE WORDING FOR YOUR WILL

If you don't have a Will yet or are not sure how to include a bequest in your Will, we advise that you speak to a solicitor. Here are three of the most effective options for including a bequest in your Will:

1. **After you have looked after your family and friends**

you may choose to leave what remains to The Benevolent Society. This is called a 'residuary bequest' and the correct wording is:

"I give the rest and residue of my estate both real and personal to The Benevolent Society (ABN 95 084 695 045), registered office 188 Oxford Street, Paddington NSW 2021, for its general purposes and declare that the receipt of an executive officer at the time shall be sufficient discharge of my executor's duty."

2. **An alternative** is to give whatever percentage of the residue of your estate you wish to, in which case the correct wording is:

"I give and bequeath _____ per cent of the residue of my estate to The Benevolent Society (ABN 95 084 695 045), registered office 188 Oxford Street, Paddington NSW 2021, for its general purposes and declare that the receipt of an executive officer at the time shall be sufficient discharge of my executor's duty."

3. If you choose to bequeath **a percentage of your entire estate** (up to 100%) the correct wording is:

"I give and bequeath _____ per cent of my estate to The Benevolent Society (ABN 95 084 695 045), registered office 188 Oxford Street, Paddington NSW 2021, for its general purposes and declare that the receipt of an executive officer at the time shall be sufficient discharge of my executor's duty."

If you wish to leave a bequest for a particular area of our work, please contact us.

Since our earliest days The Benevolent Society has advocated for positive social change. We have a strong track record of pioneering social welfare reform, and this legacy informs our work today.

➤ **Established in 1813** ➤ Gave shelter to the homeless adults ➤ **Made free legal aid available to disadvantaged in Australia** ➤ **Fought for and secured the oldest law centre in Australia** ➤ **Established the Royal Hospital for the Insane** ➤ **Developed innovative services in aged care** ➤ **Jointly founded Social Ventures Australia to support social enterprise** ➤ **Co-founded Social Leadership Australia to create leaders in social enterprise** ➤ **Co-founded a child care consortium to acquire ABC Learning Centres** ➤ **Co-founded the Australian Bicentenary Foundation** ➤ **Bicentenary in 2013**

homeless and to destitute children and
abandoned mothers ➤ Pioneered district nursing
and age pension ➤ Set up the first baby health
hospital for Women, Australia's first maternity
child protection, women and aged care ➤
support social entrepreneurs ➤ Introduced
for change ➤ **Jointly founded GoodStart,**
Learning Centres ➤ Building towards our

*Your bequest will help us continue
our vital work well into the future.*

The Benevolent Society

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March 2011

