



General Sir
John Monash
Foundation

Shape the future of Australia

with your legacy

How to include a gift in your Will



*John Monash Scholars attending the 2019
Global Symposium at the University of Melbourne*

Celebrating your life's passions and making an enduring impact on the future



"The privilege of education carries great responsibilities – it is given not for individual benefit alone, but to befit persons for the higher duties of citizenship and for roles of leadership in all fields..."

General Sir John Monash

A message from the Chairman

I am honoured to invite you to leave a gift in your Will to the John Monash Foundation which will help shape the future of Australia in a tangible and enduring way.

Such a gift will assist the Foundation in its mission to support outstanding Australians with the education, international networks and confidence to tackle the complex challenges facing our nation. Our Scholars are chosen on the basis that their qualities are reflective of these values. They are focused on gaining skills to then apply themselves to solve

the 'wicked' problems of our time and advance knowledge for the benefit of our nation

We understand that a gift of this nature is a very special act of generosity and that, of course, your first priority is to your family and loved ones; however, we would be forever grateful if you were to gift part of your estate to the Foundation so that it can continue with its mission of selecting, funding and nurturing John Monash Scholars and thus develop Australia's future leadership. I hope you will join us in our vision to transform Australia through inspired leadership.



A handwritten signature in black ink, reading "Jillian Segal". The script is elegant and cursive.

Jillian Segal AO
Chairman
General Sir John Monash
Foundation

How your bequest will make a difference

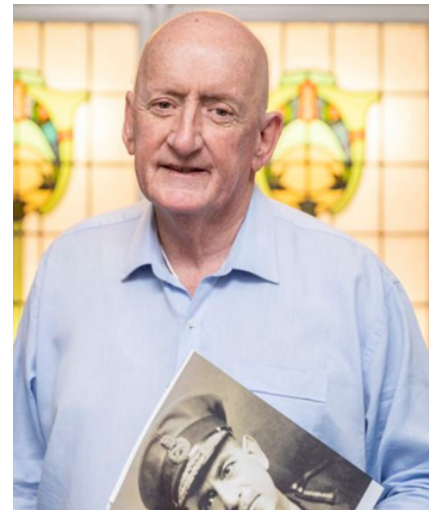
Leaving a gift in your Will is a powerful way to celebrate your life's passions and have an enduring impact on the future of Australia. Your gift will honour your memory and provide a legacy of hope for generations to come.

It is your decision whether your gift is directed to a specific purpose or without a defined intention. You can choose where your gift belongs. An **open Gift to the Foundation** provides us with the flexibility to dedicate the funds to scholarship stipends.

You can provide **Support the Scholar Alumni Community** to build their connectivity and promote their endeavours through a range of programs and initiatives, including the Global Symposia, leadership and professional development programs.

Establish a **John Monash scholarship in your name or the name of someone you celebrate**. A scholarship year requires a donation of \$90,000

A **perpetual, named John Monash Scholarship** ensures you have a Named John Monash Scholar in the field at all times. A perpetual scholarship year requires a



Tim Fischer AC

donation minimum of \$3,000,000.

An endowed Scholarship allows a new Scholar awarded each year in your memory. An endowed scholarship requires a donation minimum of \$5-7,000,000.

How to include a gift in your Will

Advising us of your decision to make a gift to the General Sir John Monash Foundation in your Will assists us in planning for the future and provides us with an opportunity to discuss with you how you would like to support used.

There are different types of gifts you can leave in your

Will to the General Sir John Monash Foundation.

A **residuary gift**: made from the balance remaining from your estate once gifts of money and specific items have been distributed. You can give the whole of the residue to the General Sir John Monash Foundation, or a portion of it.

A **pecuniary gift**: a specified sum of money from your estate.

A **specified gift**: involves leaving a particular item of value to the Foundation, such as a residential property, company shares or artwork. If you are considering leaving a non-monetary gift to the Foundation, we ask that you contact us to ensure the Foundation is in a position to accept the gift and honour your wishes for it.

Legal wording for your Will

We recommend that you consult an independent solicitor or accredited wills and estate specialist to ensure your wishes are recorded correctly.

If you do not have a solicitor, Law Societies in every state or territory publish lists of accredited specialists in Wills and Estates. If you wish to change your Will, we encourage you to talk to your legal representative.

You can either add a clause to your Will pertaining to your gift or add a codicil – short legal amendment – to an existing Will. Examples for your legal advisor are indicative of language and important information to include.

RESIDUARY WORDING FOR GIFT OF WHOLE OR PART OF ESTATE:

I give (the whole of my residuary estate/x of y parts of my residuary estate) to the General Sir John Monash Foundation ABN 78 099 065 184 (“Foundation”) currently of Bennelong House, 9 Queen Street Melbourne Victoria 3000, to be used for the general purposes of the Foundation. I declare that the receipt of the Company Secretary or other Authorised Representative of the Foundation shall be a complete discharge to my executors or trustees.

SPECIFIC LEGACY CLAUSE:

I give the sum of \$, free of all duties and taxes, to the General Sir John Monash Foundation ABN 78 099 065 184 (“Foundation”) currently of Bennelong House, 9 Queen Street Melbourne Victoria 3000 to be used for the general purposes of the Foundation. I declare that the receipt of the Company Secretary or other Authorised Representative of the Foundation shall be a complete discharge to my executors or trustees.

Thank you for sharing our vision

Thank you for considering making this very special gift and being part of our future. We understand this is a very personal act of generosity and will work closely to ensure your philanthropic wishes are fulfilled.

We warmly invite you to talk with us to have a confidential discussion about how your legacy could be structured.

welcome you to the General Sir John Monash Foundation family.

Best Wishes,

Annemarie

Annemarie Rolls
CEO



General Sir
John Monash
Foundation

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