



General Sir
**John Monash
Foundation**

Shape the future
of Australia
with your legacy

How to include a gift in your Will

A message from The Chairman



Jillian Segal AO, Chairman
General Sir John Monash Foundation

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.

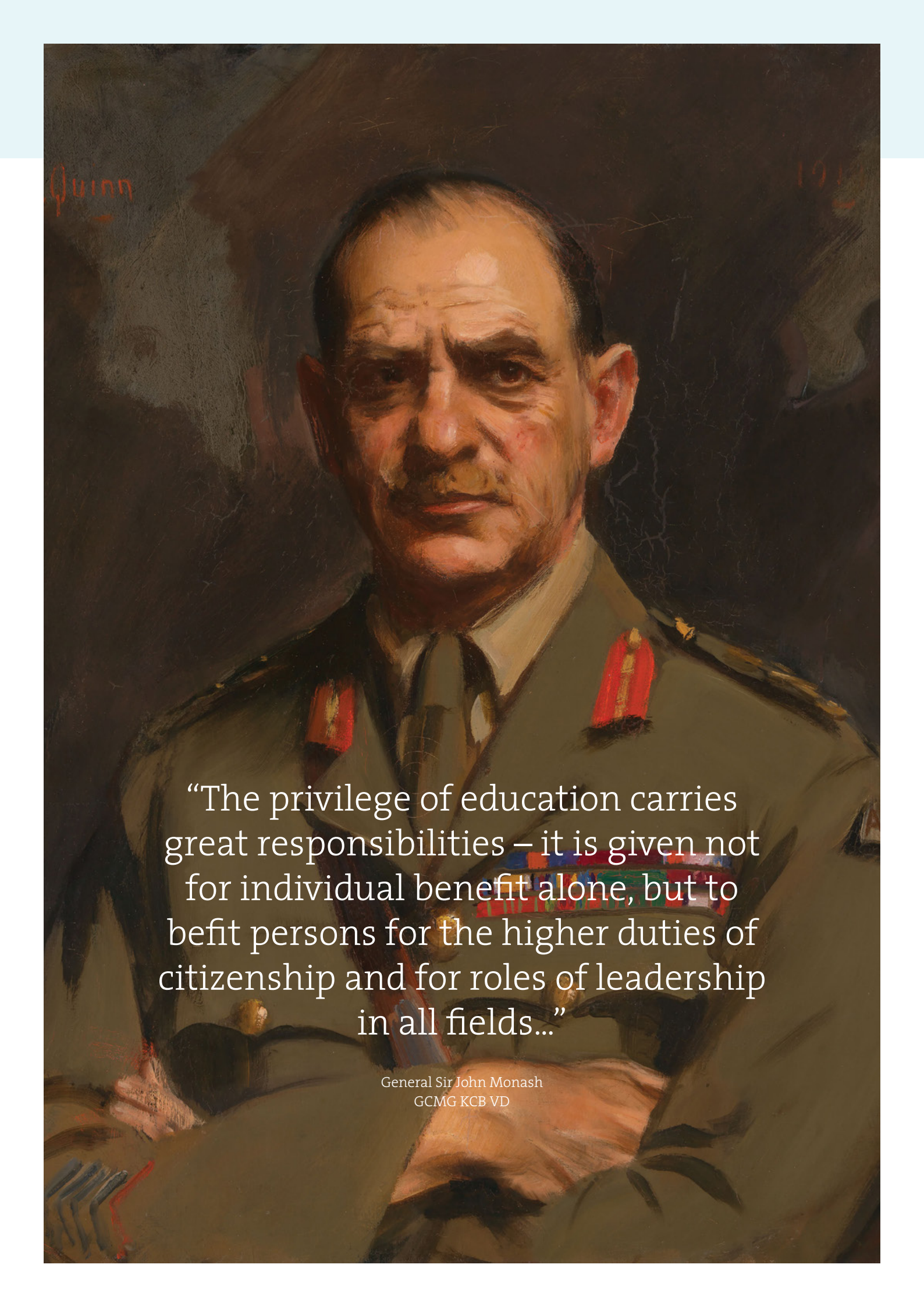
Our Scholars are chosen on the basis that their qualities are reflective of these values. They are focused on gaining skills to then apply themselves to solve the 'wicked' problems of our time and advance knowledge for the benefit of our nation.

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 that reads "Jillian Segal".

Jillian Segal AO
Chairman
General Sir John Monash Foundation

A detailed oil painting of General Sir John Monash, a prominent Australian military leader. He is depicted from the chest up, wearing a dark military uniform with a high collar and a red sash. His expression is serious and contemplative. The background is dark and textured, with the name 'Quinn' and the year '1919' faintly visible in the upper corners. The lighting is dramatic, highlighting his face and the texture of his uniform.

“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
GCMG KCB VD

The General Sir John Monash Foundation supports students capable of identifying and tackling the challenges of our time.

We seek Australians of vision, energy and talent ready to pick up the baton and become leaders. Our scholarships provide talented individuals with a platform to create positive and lasting change.

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. A general bequest to the Foundation can be left to support the work of the Foundation, including scholarships and the Alumni Community.

An open Gift to the Foundation:

Provides us with the flexibility to dedicate the funds to scholarship stipends.

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:

This can be for any number of specified scholarship years and provide a one, two or three year award for the successful candidate. Each scholarship year requires a donation of \$90,000*.

Establish a perpetual, named John Monash Scholarship:

A substantial bequest to the scholarship endowment will ensure you always have a Scholar in the field carrying your chosen name.

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 able to accept the gift and honour your wishes for it.

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



L to R, 2023 Chairmans Circe John Monash Scholar Henry Marshall and John Allpass AM at the Presentation Ceremony at government House, Canberra.

"I will be forever grateful to the support of others to the John Monash Foundation. It uniquely enables me to attain the highest quality scientific training, to then return to Australian with capability to positively influence the quality of healthcare in this country."

Henry Marshall 2023
Chairmans Circe John Monash Scholar



Legal wording for your Will

We recommend that you consult an independent solicitor or accredited Wills and Estates 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 contact our expert team for a confidential discussion about how your legacy could be structured. On behalf of the Foundation, we welcome you to share our mission for a bright and promising future. Best Wishes,

Annemarie Rolls,
Chief Executive Officer

Contact information

Please contact our experienced team if you would like to discuss leaving a gift in your Will to the General Sir John Monash Foundation.

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