



General Sir
John Monash
Foundation



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

*Shape the future
of Australia*
with a gift in your Will

The General Sir John Monash Foundation provides postgraduate scholarships for outstanding Australians to study at leading institutions anywhere in the world.



Heather Muir, 2018 ANZAC Centenary John Monash Scholar

John Monash Scholarships are Australia's own postgraduate scholarships. These prestigious awards enable scholars from a diverse range of disciplines to deepen their expertise, build international networks and achieve progress in tackling some of the major challenges of our time.

The Foundation is dedicated to nurturing our brightest students and investing in their development to become the future leaders of our nation.

We warmly invite you to join with the General Sir John Monash Foundation in this important nation-building quest, to support exceptional Australians in all fields to develop their skills and leadership.

By choosing to leave a gift in your Will to the Foundation, you will play a vital part in shaping a positive future for Australia.

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.

General Sir John Monash said,



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...



Our Scholars are chosen on the basis that their qualities are reflective of these values. They are focussed 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.



Jillian Segal AO
Chairman
General Sir John Monash
Foundation

Why leave a gift in your Will to the General Sir John Monash Foundation?

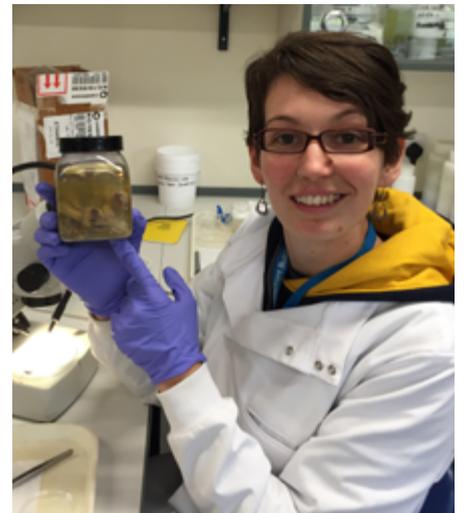
Leaving a gift in your Will is a powerful way to leave a legacy and have an enduring impact on the future of Australia. Your gift will honour your memory and provide a pathway for future leaders.

Our mission is to support exceptional Australians who have the qualities to contribute to a positive future: intelligence, tenacity, talent and courage, with a vision that will benefit the nation. By supporting the Foundation, you will help shape the future of Australia.

Gifts in Wills are an important part of the Foundation's long-term goal of supporting the brightest minds of our nation and their endeavours to pursue excellence in their chosen fields. They allow us to plan well into the future and ensure John Monash Scholarships continue in perpetuity, honouring the name and inspirational legacy of one of Australia's greatest leaders, who contributed so much to the benefit of all Australians.



John Monash Scholars are leaders shaping Australia's future



Clockwise from top:
Jillian Kilby, 2013 BHP John Monash Scholar
Arlie McCarthy, 2017 Commonwealth Bank John Monash Scholar
Ahmad Shah Idil, 2018 Australian Universities' John Monash Scholar
Harrison Steel, 2016, Roden Cutler NSW John Monash Scholar

How your bequest will make a difference

Your legacy gift to the General Sir John Monash Foundation is critical in helping outstanding Australians to develop leadership skills and capabilities in their fields and fulfil their ambitions to make a positive contribution to our nation.

It is your decision whether your gift is directed to a specific purpose or without a defined intention. Your gift can be used to support a number of different areas including:

- An open gift to the General Sir John Monash Foundation which 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 development and other professional development programs.
- Establish a John Monash Scholarship in your name or in the name of a loved one. Depending on the amount gifted you may be able to fund a scholarship, or multiple scholarships. A scholarship year requires a donation of \$80,000 (value as at 2020).
- Establish an endowed Named John Monash Scholarship in perpetuity with a minimum donation of \$3 million (value as at 2020), providing a Named John Monash Scholar in the field at all times. The opportunity also exists to create an endowed Scholarship where there is a new Scholar awarded each year. This can be established with a gift of \$5–7 million (value as at 2020).



If you would like to make a specific gift, please contact us as it would be our pleasure to discuss your ideas or preferences with you.

A gift from the heart to nurture Australian leadership

A legacy gift from much-loved former Deputy Prime Minister, the late Honourable Tim Fischer AC, will support talented John Monash Scholars to collaborate and exchange in their fields of study.

In 2019, the General Sir John Monash Foundation was honoured to receive a bequest of \$100,000 from the Estate of the late Tim Fischer AC. Tim Fischer was a close friend and lifelong supporter of the Foundation, having played an integral role in the very founding of the John Monash Scholarships and joining the Board of Directors in 2001.

The funds from his generous bequest will be used to support the 'Alumni Collaboration Fund', a new initiative by the Foundation commencing in October 2020, which will enable John Monash Scholars to connect with each other in their fields of expertise and develop projects which might not otherwise receive funding. Examples could include a joint research project, policy development or a creative endeavour or production.

"We are incredibly grateful for Tim Fischer's generosity and believe this project will be a fitting tribute to honour his legacy for many years to come" said Annemarie Rolls, CEO of the General Sir John Monash Foundation. "This is an exciting initiative which will foster community and collaboration amongst John Monash Scholars, that serves our great nation and nurtures the development of Australian leadership across all areas of society."



“

It is very special to us as a family to continue the connection that Tim had with the General Sir John Monash Foundation and particularly with the Scholarship alumni. Tim was passionate about the need for a truly Australian leadership program that highlighted innovation, excellence and education. Each time he attended a Foundation event, he was inspired by the people he met and the conversations he had with applicants, recipients and the dedicated team that made it all happen. Hence his desire to leave a legacy that supports this vital work for the future.

”

Judy, Harrison and Dominic Fischer
August 2020

How to include a gift in your Will

We understand that including a gift in your Will is a very personal act of generosity and that your first priority is to your family and those closest to you. We also believe it is important for you to discuss with them your intentions and why leaving a gift to the General Sir John Monash Foundation is important to you.

Should you decide to build your legacy by including the General Sir John Monash Foundation in your Will, we would be delighted to hear from you so that we can warmly welcome you to the General Sir John Monash family and acknowledge your generosity during your lifetime. It will enable us to ensure your gift will enrich your life through the experience of engaging with John Monash Scholars, attending signature events and sharing the journeys of the Scholars as they progress with their postgraduate study and help shape Australia's future through their work and leadership in their fields.

Choose the type of gift

There are different types of gifts you can leave in your Will to the General Sir John Monash Foundation, depending on your circumstances and preferences. These include:

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. This is a valuable way to leave a gift in your Will to us, as it maintains the relative value of your gift.

A pecuniary gift: a specified sum of money from your estate. The value of this gift may change significantly over time due to inflation.

A specified gift: which 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 of your choice when drafting your Will, as the wording is very important and you can be sure 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. Trustee companies can also advise you. 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.

The following sample wording may be helpful for you, used in consultation with your solicitor when drafting your Will.

If you would like your gift to go towards a specific purpose within the John Monash Foundation, please contact us to discuss your ideas and we would be delighted to work with you and your solicitor to honour your wishes.

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

If you have left a gift in your Will to the Foundation please do let us know, as it not only allows us to plan for the future, but also gives us the opportunity to personally thank you for your generosity

and welcome you to the General Sir John Monash Foundation family.

Best Wishes,

Annemarie

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Chief Executive Officer

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General Sir
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[https://www.youtube.com/c/
GeneralSirJohnMonashFoundationMelbourne](https://www.youtube.com/c/GeneralSirJohnMonashFoundationMelbourne)



Disclaimer: The information in this brochure is correct at the time of publication and is subject to change. Published August 2020.

“

Loyalty to a common cause,
courage, comradeship and
mutual co-operation are
part of our tradition and an
inspiration to all Australians.

”

General Sir John Monash
GCMG KCB VD



*Image: John Monash, 1919 by James Quinn
Collection: National Portrait Gallery, Canberra*