

How to leave a bequest in your Will



There are 3 ways you can leave a bequest to Plan:

- After meeting all your personal commitments you can choose to leave Plan the balance or residue of your estate
- You can leave a percentage of your estate
- You can leave a specific sum.

You can use the suggested wording on the right to describe the type of bequest you wish to make in your Will.

If you are unsure how best to help Plan, leaving a residual gift is the answer. A residual gift is one left from the residue of your estate once you have provided for all your family and friends. This may be the best option as inflation will not diminish the value of your gift.

We strongly recommend you seek qualified legal advice when making a will or changing an existing will. The Law Institute or Society in your estate can advise you of a solicitor trained in the area of wills and estates.

If you would like to talk to someone about leaving a bequest to Plan, please call our Bequest Coordinator on **13 PLAN (13 7526)**.

If you would like more information about Plan, please visit www.plan.org.au.

1 A GENERAL BEQUEST

“I give and bequeath to Plan International Australia of 1/533 Little Lonsdale St, Melbourne, in the State of Victoria, Australia, <the residue of my estate> or <% of my estate> or <the sum of \$.....> to be used for its general purposes, and I direct that the receipt of the authorised officer of Plan International Australia shall be a good and sufficient discharge to my trustee/s who shall not be obliged to see the application thereof.”

2 CONTINUING AN EXISTING CHILD SPONSORSHIP

“I give and bequeath to Plan International Australia of 1/533 Little Lonsdale St, Melbourne, in the State of Victoria, Australia, <the residue of my estate> or <% of my estate> or <the sum of \$.....> to be used for the benefit of my present sponsored child/children so long as the child/children remain/s eligible for help and thereafter the entire sum may be applied for Plan International Australia’s general purposes. I direct that the receipt of the authorised officer of Plan International Australia shall be good and sufficient discharge to my trustee/s who shall not be obliged to see the application thereof.”

3 BEQUEST TO PLAN PROJECTS

“I give and bequeath to Plan International Australia of 1/533 Little Lonsdale St, Melbourne, in the State of Victoria, Australia, <the residue of my estate> or <% of my estate> or <the sum of \$.....> to be applied to Plan International Australia child centred community development projects as determined by Plan International Australia. I direct that the receipt of the authorised officer of Plan International Australia shall be good and sufficient discharge to my trustee/s who shall not be obliged to see the application thereof.”

