



**A lasting gift**  
to help save and  
improve lives.

Gifts in wills

## A message from the Board Chair, Monash Health



Monash Health and our predecessor organisations were built on a basis of philanthropy.

Today, we value financial donations and support given by generous donors to causes across our health services including Monash Medical Centre, Monash Children's Hospital, Dandenong Hospital, Moorabbin Hospital, Casey Hospital and our many centres in the community.

Donations made through a will are a vital component of support for Monash Health. In fact, an estate that was established in 1914 still provides support to us each year. Numerous lives have been positively impacted by this generosity and forethought.

Leaving a gift to Monash Health in your will is a powerful way to make a significant difference to the lives of others for many years to come.

Your gift will be carefully managed by Monash Health, through Monash Health Foundation. We will ensure that your final wishes are honoured and respected.

I invite you to consider a gift to Monash Health. Please do think of your family and other loved ones first. Please also seek independent legal counsel for estate planning.

We will greatly value your gift, no matter how large or small. Your generosity will help save and improve lives.

Yours sincerely,

**Mr Dipak Sanghvi**  
Board Chair  
Monash Health

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Monash Health is Victoria's largest public health service. We provide high-quality care across the entire lifespan, from pre-birth to end-of-life.

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## Why gifts in wills are important

By making a gift in your will to Monash Health (also known as a bequest) you will be creating a legacy which will have a lasting impact on patient care and research at our health service.

Throughout the history of Monash Health gifts large and small from generous people have made a significant impact to our ability to save and improve lives.

By making a provision in your will to Monash Health or a particular Monash Health service, you give a gift that makes a difference beyond your lifetime.

Leaving a bequest helps ensure our excellence and success into the future for the people of Victoria.

### We warmly invite you to:

Contact us if you are interested in leaving a gift in your will.

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Meet with the Monash Health Foundation to learn more about the needs of the health service.

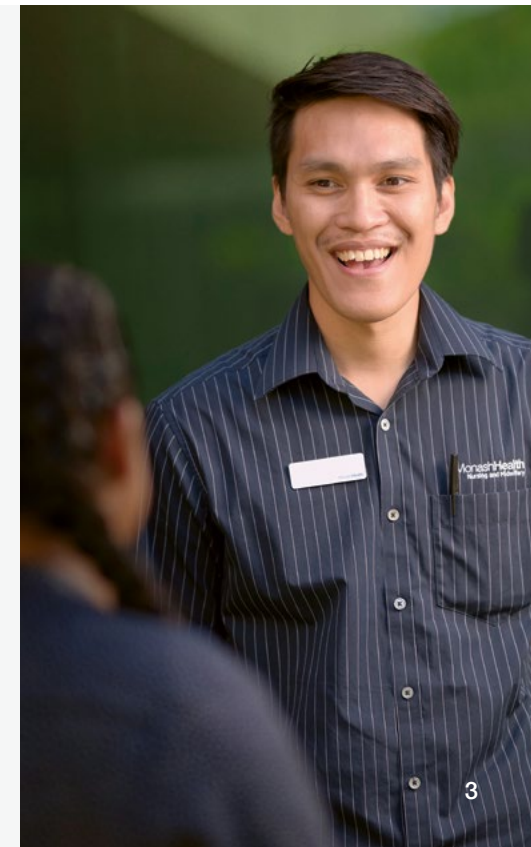
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Visit Monash Health and meet our health care professionals.

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Be acknowledged in your lifetime.

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## How to make a gift in your will

There are several ways that you can make a bequest to Monash Health and leave a lasting gift for patient care, education and medical research.

- A residual bequest – after you have made provisions for your family and loved ones, a percentage of the residual amount can be directed to Monash Health
- A specific bequest – such as money, real estate or shares
- A pecuniary gift – a specific sum of money
- Whole of estate
- A percentage gift

It is possible to specify that your gift be utilised for a specific purpose or facility, for example:

- For the health service's most urgent needs first
- For treatment and care of patients
- For research and education
- For a particular service



## Your will: checklist

### 1 What do you have to leave behind?

Your 'Estate' is a list of what you own, giving you a good idea of the total value of your Estate, which you will be able to share amongst the people (the 'beneficiaries') you care most about.

Any gift in will amount provided to Monash Health is appreciated and will provide a lasting impact on patient care, training and research at our health service.

### 2 Which people and causes would you like to include in your will?

Ensuring family, friends are taken care of after you've gone is an important consideration. Limit any misunderstandings about your legacy and wishes by starting a conversation with your loved ones.

### 3 Have you found a solicitor to write or update your will?

Your will is one of the most important legal documents getting it right is important for your family and friends.

### 4 Have you asked your solicitor to include a gift to Monash Health in your will?

It's simple to include a gift to Monash Health in your will. Decide what type of gift you'd like to include and ask your solicitor to use our correct legal name and ABN, bequeath to Monash Health in the State of Victoria, ABN 82 142 080 338, 246 Clayton Road, Clayton, Victoria 3168. (See also suggested wording on page 12).

### 5 Have you updated your will to reflect any major changes in your life?

- Changed your wishes
- Lost your spouse, partner or family member
- Married, divorced, separated or re-married
- Had children or grandchildren
- Retired
- Acquired / divested property
- Come into some money or an inheritance
- Death of a beneficiary or Executor

### 6 Professionally drafted wills v DIY will kits

DIY will kits are affordable and readily available, however, we recommend consulting with a qualified solicitor or a Trustee Company (such as the Public Trustee in your State) to ensure your wishes are correctly represented in your will and are legally valid instructions.

To find a local solicitor who practices in 'Wills and Probate', contact the Law Society or Law Institute in your state or territory or your state Trustee Company.



## Other things to consider

- Always name an alternative Executor and provide for discretion in your will – accommodating change further down the track and if the name of the charity or our location has changed.
- Encourage your solicitor to contact us if they have any questions about how to include Monash Health in your will.
- Consider directing your superannuation and/or life insurance into your Estate as those items do not automatically form part of your Estate.
- Discuss important aspects about your will with your family, friends and Executors.
- Make sure your will is kept in a secure place that's easy to find. Ensure that your Executor knows where your will is located.



## Wording

When preparing your will it is recommended to seek advice from an independent legal practitioner. This helps to ensure the wording is in accordance with your wishes.

“I, **(insert name)**, devise and bequeath to Monash Health in the State of Victoria, ABN 82 142 080 338, free of all duties, the following: **(insert type of bequest)**. For the express purpose of **(specific purpose)**.”

“I direct that the receipt of the approved officer of Monash Health shall be sufficient discharge to my Executor for the Bequest.”

If you choose to give for a specific purpose, please consider including the following provision in your will:

“If at any time Monash Health Foundation determines that it is impossible or impractical to fulfil the purpose of my bequest, the Foundation may apply the bequest for a related purpose that will most closely aligns with the spirit and intent of my bequest.”





## A lasting gift to help save and improve lives

- I intend to leave a gift in my will to Monash Health.
- I have already made arrangements to include a donation in my will to Monash Health.
- Please contact me to discuss my bequest to Monash Health.

I prefer to be contacted via:

- Email
- Mail

### My details

Title: \_\_\_\_\_

First name: \_\_\_\_\_

Family name: \_\_\_\_\_

Postnominals: \_\_\_\_\_

Address: \_\_\_\_\_

Suburb: \_\_\_\_\_

State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Email: \_\_\_\_\_

Telephone (mobile preferred): \_\_\_\_\_



A member of the team from the Monash Health Foundation can provide information and assistance to ensure that making your bequest to Monash Health is a straightforward and rewarding experience.

If you require further advice or for a confidential discussion, please contact the Monash Health Foundation on the details below.

### Monash Health Foundation

Phone: + 61 3 9594 2700

Email: [foundation@monashhealth.org](mailto:foundation@monashhealth.org)

Please return this form to:

### Monash Health Foundation

Locked Bag 29

Clayton South Victoria 3169

At the Monash Health Foundation we respect your privacy. We collect personal information through this form so we can respond to your requests and to send you communications. Monash Health likes to keep you updated on how you can make a difference. If you would like to change your communication preferences please contact us at [foundation@monashhealth.org](mailto:foundation@monashhealth.org) or 03 9594 2700. ABN: 82 142 080 338.



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Clayton South Victoria 3169