

A **Will** is an important document which describes how your worldly possessions are to be distributed following your death. The possessions, property and money which remain after your death are known as your **Estate**.

An **Executor** is a person appointed by you to ensure that your Estate is dealt with in accordance with your wishes.

Probate is a court order granted by the Probate Division of the Supreme Court which gives the Executor of your Will the power to deal with your Estate.

The people or organisations you choose to benefit from your Estate are known as your **Beneficiaries**.

A Gift in your Will is known as a **Bequest**. There are many types of bequests, however they generally fall into one of four categories.

- **Distributable Estate** - Where you choose to leave all that remains of your Estate, after payment of your debts and the costs of administration, to Caritas.
- **Residual** - The remainder, or residue, of your Estate after you have provided for family & friends by specific legacies or bequests. This is a wonderful way to ensure Caritas Australia gets the most help possible, whilst also ensuring your loved ones are catered for exactly as you would wish.
- **Percentage or Fractional** - A percentage, or fraction, of the residue of your Estate after you have provided for family & friends.
- **Specific** - A specified gift, whether an amount of money (Legacy), property, bank deposits or shares.

For your Will to be **Formal** it must be:

- **In writing** - handwritten, typed or printed;
- **Signed by the Testator**, and
- **Signed by 2 Witnesses** who must be present when you sign your Will, and must not be beneficiaries.

If you already have an up-to-date Will and decide that you would like to add a Bequest to Caritas in it, your solicitor or legal adviser will be able to add a **Codicil** to your Will.

If you die without making a Will, you will be deemed to be **Intestate** and your Estate will be distributed to near relatives according to a formula set out in law. No charity can receive a benefit if you die intestate.

Bequests can be made to Caritas Australia for **General Purposes** which allows us to use your Gift where it will have most impact at the time of your death. It may be used for an emergency appeal, or to help fund a development or educational program here in Australia or Overseas. You may wish your Estate to be invested in an area of personal interest. In this case, please contact our Bequests Coordinator to discuss the wording as our program and appeals may have changed by the time your Will comes into effect.



“It may be a drop in the ocean to some, but that drop, for that particular person, makes all the difference for generations, yes, actually generations.”

Sister Veronika Schreimer, Sisters of the Faithful Companions of Jesus, Philippines

Option 1

“I give to The Australian Episcopal Conference of the Roman Catholic Church for the purposes of Caritas Australia, the Catholic Agency for Overseas Aid and Development,

% of the residue of my Estate for its general purposes, free of (or after payment of) all duties and taxes payable upon or in consequence of my death. I declare that a receipt issued by the Chief Executive Officer of Caritas Australia shall be a sufficient discharge to my Trustees.”

Option 2

“I give the sum of \$ to The Australian Episcopal Conference of the Roman Catholic Church for the purposes of Caritas Australia, the Catholic Agency for Overseas Aid and Development for its general purposes, free of (or after payment of) all duties and taxes payable upon or in consequence of my death. I declare that a receipt issued by the Chief Executive Officer of Caritas Australia shall be a sufficient discharge to my Trustees.”

Option 3

“I give my Life Insurance Policy No. with (name of Insurance Company) to The Australian Episcopal Conference of the Roman Catholic Church for the purposes of Caritas Australia, the Catholic Agency for Overseas Aid and Development for its general purposes, free of (or after payment of) all duties and taxes payable upon or in consequence of my death. I declare that a receipt issued by the Chief Executive Officer of Caritas Australia shall be a sufficient discharge to my Trustees.”

Option 4

“I give my property at to The Australian Episcopal Conference of the Roman Catholic Church for the purposes of Caritas Australia, the Catholic Agency for Overseas Aid and Development for its general purposes, free of (or after payment of) all duties and taxes payable upon or in consequence of my death. I declare that a receipt issued by the Chief Executive Officer of Caritas Australia shall be a sufficient discharge to my Trustees.”

Option 5

Sole Beneficiary and Executor
“I give the whole of my estate wherever it is situate to The Australian Episcopal Conference of the Roman Catholic Church for the purposes of Caritas Australia, the Catholic Agency for Overseas Aid and Development, and I appoint the Secretary of The Australian Episcopal Conference of the Roman Catholic Church at the date of my death as the sole Executor and Trustee of this my Will.”



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Our mission

Caritas Australia works towards the creation of a world that God desires to be just and compassionate. Caritas works for the freedom of those who are oppressed by injustice, bringing ‘sight’ to both those who are powerless and powerful and proclaiming to the poor the good news of their human dignity. This work is undertaken principally through the life-giving activities of aid and development.