

Wills & Bequests *Information for solicitors*



PHOTO: SEAN SPRAGUE

Wills & Bequests – Information for solicitors

Your Client has expressed an interest in leaving a bequest to Caritas. This leaflet contains the preferred wording to enable you to accommodate their wishes.

If you wish to receive an electronic copy of this file, or our general bequests leaflet entitled Wills & Bequests – A Legacy of Love, please contact our Bequests Coordinator on 1800 024 413 or email growingspirit@caritas.org.au.

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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Caritas Australia ABN 90 970 605 069

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.