

BEQUEST NOTIFICATION FORM

Use This Form When Making A Will

If you have decided to include Fintona Girls' School in your Will, please advise us of your intention by completing this form.

Please note that this form does not commit you to a particular course of action nor limit your freedom to change your Will in the future – it is simply a confirmation of your present intentions.

**Fintona Girls' School recommends you seek legal advice from your solicitor on making a Will.
The information on this form is not legal advice to you.**

Donor Information

Full Name/s _____

Address _____ Postcode _____

Telephone _____ Mobile _____

Email _____

The following provisions for Fintona Girls' School (ABN 27 004 534 687) have been made in my Will

My Bequest Is

Outright Residue Percentage _____ %

Other (such as Life Insurance) _____

Estimated Value \$ _____

I would like my bequest to be unrestricted **Or** I would like my bequest to be used for the following purpose:

Scholarship Fund Building Fund Other (please specify) _____

I wish to be listed anonymously **Or** In recognition of my bequest in publications, please list my name in the following manner:

I agree to notify the School in the event that I make changes to my Will that affect Fintona Girls' School.

Donor(s) Signature(s) _____ Date _____

Attach a copy of the section of your Will designating Fintona Girls' School as a beneficiary.

See over for how to word a bequest in your Will.

Please return a copy of this codicil form to:

Rachael Falloon, Principal
Fintona Girls' School
79 Balwyn Road, Balwyn VIC 3103, Australia
amcintosh@fintona.vic.edu.au | +61 3 9830 1388

Privacy: All documentation is held in confidence by Fintona Girls' School in accordance with the School's privacy policy. We are most grateful to our community members who have made this commitment to the School, and we seek to recognise them (unless otherwise notified) by printing their names in publications for recognition purposes. No information other than the donor's name is shared.

How To Word A Bequest In Your Will

If you are considering leaving a bequest to Fintona Girls' School, it is important that you use the correct wording in your Will. We recommend that you discuss wording in your Will with your solicitor to ensure your bequest is clearly and legally stated.

Your solicitor may find the following bequest clause helpful:

"I give and bequeath, free of all duties, taxes or deductions to Fintona Girls' School (ABN 27 004 534 687) 79 Balwyn Road, Balwyn, VIC 3103 for the general purpose of that organisation, the following (whichever is applicable):

- a. the sum of \$ _____ ; or
- b. all my share and interest in the property known as (insert full address of property); or
- c. (insert amount) % of my Estate; or
- d. the residue of my Estate; and/or
- e. in the event that any of my nominated beneficiaries should predecease me then their bequest shall not fail but I give and bequeath the share of my deceased beneficiary to Fintona Girls' School

I declare that the receipt of The Principal or other Proper Officer of Fintona Girls' School shall be a sufficient discharge to my Executor/Trustee(s) for the bequest."

Please Note

- For a sum, insert the specific sum in dollars, which you wish to go to Fintona Girls' School.
- For a property, insert address of property, details of shares, debentures, life insurance policies, bank accounts or other assets.
- For all or a share of your entire estate, insert for example "the whole of my estate," or "forty percent (40%) of my estate."
- For a remainder gift after specific bequests are written, insert "the rest of my estate," or "sixty percent (60%) of the rest of my estate."

The gift you make to Fintona Girls' School will be an enduring tribute to your generosity and will help ensure that Fintona can continue to educate students to the highest standard.