



# Leave a legacy.

You can help save the sight of future generations with a bequest in your will to the Queensland Eye Institute Foundation.

[QEI.ORG.AU](http://QEI.ORG.AU)



# A message from Mark Radford.

Many people have been affected by vision loss either themselves or through the experience of family and friends. They know the devastating impacts of eye disease and blindness, which put everyday tasks like driving, cooking and gardening out of reach.

With 90% of eye disease in Australia preventable or treatable if diagnosed early, research into the diagnosis and treatment of sight-threatening diseases is critical, as is the education of Queensland's next generation of eye health professionals.

The Queensland Eye Institute Foundation, previously the Prevent Blindness Foundation, has supported eye research and education since 1965. With no government funding, the Foundation relies on donations and bequests from generous people like you to continue its sight-saving work.

Please read the following information carefully and consider how your legacy could fund vital vision research.

Professor Mark Radford  
CEO and Executive Director  
Queensland Eye Institute



# Making your wishes clear.

## Have you made a will?

If yes, is it up to date?

A will is an important document that states, in writing, how you would like your assets distributed after your passing. In Australia, if you die without a will, your assets will be distributed according to strict legal rules set out in legislation in each state and territory.

By making a will and reviewing it from time to time, you can be assured your estate will be distributed according to your personal wishes.

## What is a bequest?

A bequest is an instruction in your will for some of your estate to be reserved for a certain beneficiary.

After providing for your loved ones, you may decide to leave part of your estate to charity. If so, perhaps you would consider the Queensland Eye Institute Foundation.

A residual bequest is a gift of the remainder, or a percentage of your estate, after those close to you have been taken care of. It is a simple way to provide for your family, friends or other parties while ensuring your wishes regarding other beneficiaries are made clear.



## **Leaving a gift or bequest in your will is easy**

If you don't already have a will and wish to create one, you should seek legal advice from a solicitor. Alternatively, you can contact the Public Trustee in your state for assistance. If you have an existing will and want to update it, you can add a codicil, which is a legal amendment to your will.

### **How to make a bequest**

Before meeting with your solicitor or other appropriate advisor, it's a good idea to list what you own to be included as part of your estate and dealt with in your will. An estate might include your home or other property, savings, cash, insurance policies and death benefits, stocks or shares, superannuation, pension benefits, vehicles, furniture or other items.

### **How to word your bequest in your will**

To include the Queensland Eye Institute Foundation as a beneficiary in your will it's important to use correct language. The following is some suggested wording, which should be considered when talking to your legal adviser or the Public Trustee.

I GIVE (here: describe the gift or share of the estate. Some examples are: [a specifically described asset] or [the sum of \$] or [a particular percentage or share of my estate or of my residuary estate] or [the residue of my estate or all of my estate]) to QUEENSLAND EYE INSTITUTE FOUNDATION ACN 009 737 384 (the Foundation) of 87 Ipswich Road, Woolloongabba, to be applied for the Foundation's general charitable purposes [and here if desired: insert the specific purpose that you would like the gift to be used for, or preferably, express as a wish, the purpose to which the Foundation might use the gift. You may wish to discuss the proposed use with the Foundation before making your will]. In relation to this gift I DECLARE that a general charitable intention shall apply and that the receipt of the Executive Director, or other officer duly authorised by the Foundation in that behalf, shall constitute a full and sufficient discharge to my executor who shall not be obliged to seek or enquire into the application of the subject matter of this gift.

Once your will has been drawn up, remember to keep it in a safe place and tell your family, friends or executor where to find it.

## **Am I able to specify how my bequest will be used?**

Yes. It is common for donors to ask that their bequest is directed to an area in which they have a special interest.

## **Can my family be informed of the result of my legacy?**

We encourage donors and their families to join us for a tour of our facilities. In our experience many families enjoy seeing how the legacy of their loved one is being fulfilled. We take enormous pride in showing families the results of their support and our aims for the future.

## **Can my bequest remain anonymous?**

Yes. We are very respectful of our donors' wishes and mindful that some people prefer their gift remains anonymous.

## **Living bequests**

A living bequest begins during your lifetime, with a series of tax-deductible donations to the Foundation. A gift in your will tops up your contribution to complete your living bequest.

Living bequests may include cash donations, property, investments, or other assets and often provide tax benefits to the donor. Making a bequest while still living allows you to see the impact of your gift.




# Who do I contact at the Queensland Eye Institute Foundation for more information?

If you would like more information about the work of the Queensland Eye Institute or have any questions about leaving a bequest, gift or donation, please contact our Community Liaison Officer or Executive Director on **07 3239 5050**.

This publication is not intended to be legal advice.

We recommend you seek such advice from a registered solicitor.



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