

*Providing hope for the future.*

ANGLICARE BEQUEST PROGRAM



## OUR MISSION

Anglicare's mission is to tackle social injustice and disadvantage in partnership with the Anglican Church.

## OUR VALUES

### Compassion:

In the spirit of loving service, we offer care and understanding to those in need.

*The well-known Bible story, the parable of the Good Samaritan (Luke 10:29-37) calls us to radical generosity and costly service. In telling this story, Jesus teaches us how societal and personal barriers of prejudice and self-interest may cause us to turn away from those in need.*

### Dignity:

We respect the intrinsic worth of every person and acknowledge their capacity for self determination.

*Jesus said, 'You shall love your neighbour as yourself.' (Mark 12.31). Jesus advocates love for God, love for our neighbour, and love of our self. We are called to respect the dignity of all human beings, for together we are bearers of the Divine image.*

### Inclusiveness:

We serve all people with a spirit of openness because we share a common humanity.

*Jesus began his ministry in a religious and cultural environment where exclusion was common. Jesus' openness to ordinary people – even those who were considered by society to be ritually unclean or regarded as 'sinners' – stands out starkly. In one example Jesus is criticized for eating with "sinners and tax collectors" (Mark 2.15-17). Through the simple act of sharing a meal, a new, inclusive community is formed, where the old labels simply don't apply, and a spirit of openness prevails.*

### Integrity:

We are committed to personal and corporate honesty, fairness, and transparency.

*The Christian tradition teaches that integrity is not just an isolated action, but an attitude, an orientation that stems from humility and regard for others. 'Do nothing from selfish ambition or conceit, but in humility regard others as better than yourselves. Let each of you look not to your own interests, but to the interests of others' (Philippians 2.3-4). 'Whoever is faithful in a very little is faithful also in much; and whoever is dishonest in a very little is dishonest also in much' (Luke 16.10).*

Dear Friend,

Thank you for giving consideration to making a bequest to support work of the Anglicare NSW South, NSW West and ACT in local communities. Your thoughtfulness and generosity is a tangible investment in God's mission of bringing the love and truth of Jesus real to a diverse and needy world.

The care, justice and advocacy work of Anglicare transforms the lives of vulnerable individuals, families and communities, leaving a mark that can endure for generations. Be assured that Anglicare's board and management are committed to wise stewardship of any bequest so it makes a profound impact in people's lives.

I encourage you to seek any necessary legal advice in making your will and to discuss your wishes with immediate family members so they might understand and appreciate the breadth of Anglicare's work and your desire to support it in this way.

God's word compares the act of giving to a 'sweet-smelling' sacrifice. May God guide you so that the aroma of Christ's love continues to refresh our world.

Yours in Christ,

Bishop Mark Short



**"THIS IS ONLY POSSIBLE  
BECAUSE OF THE  
GENEROUS SUPPORT OF  
PEOPLE LIKE YOU."**



Over 150 years ago Anglican parishes began providing community care across rural NSW. Then in 1888, Mother Esther formed the Community of the Holy Name to help people in Melbourne's slums. By the 1950's, sisters from the Holy Name were running three children's homes within the Goulburn Anglican Diocese. From the 1970s, the focus changed and the work expanded to include family support, emergency housing and Early Childhood Education and Care services.

Today Anglicare continues to assist individuals and families who are doing it tough. The organisation remains committed to demonstrating Christ's love in action, giving practical support to help people thrive in life.





Over  
**3 million people**  
in Australia are living with poverty.

Source: Australian Council of Social Services

This means a lack of nutritious food, unstable housing, poor health care, interrupted education, distressed family relationships and the potential for lifelong difficulties - especially for children.

As the social justice arm of the Anglicare Church, Anglicare helps the most disadvantaged children and families to hope, heal and thrive so they can lead lives free from poverty.

“...THAT THEY MIGHT  
HAVE LIFE AND HAVE  
IT ABUNDANTLY.”  
JOHN 10:10



## How You Can Make a Difference

When you leave a bequest to Anglicare you leave a legacy of love and hope.

You can change the lives of our most vulnerable community members by giving the gift of a lifetime.

We would welcome the opportunity to meet with you to answer any further questions and to help you make an informed decision.

The following are some of the Anglicare programs that a gift in your Will could support.





A BEQUEST TO  
ANGLICARE IS  
A VISIONARY  
CONTRIBUTION THAT  
CHANGES LIVES.



## Surviving to Thriving

**B**ecause poverty is complex and pervasive, impacting many areas of a person's life, a holistic approach is required to produce lasting change. This is why we deliver services through a Survive and Thrive model that addresses immediate critical needs as well as long term needs of those who are most disadvantaged and marginalised.

To break the cycle of poverty we offer holistic, child-focused support in the early years and during adolescence.

We focus on working with children, young people and families who are homeless or in crisis addressing their immediate physical needs, and also supporting their long-term social, emotional, spiritual, educational and financial needs as they work towards a better future where they can thrive.

We support parents to make sure their children are school ready and then stay engaged with school and post-school training.

*A bequest to Anglicare is a visionary contribution that changes lives through programs like Survive and Thrive. By including Anglicare in your Will you are partnering with us to bring about positive change in the lives of those in need.*





YOUTH +  
FAMILY

## Youth Services

Our youth services encompass youth health and wellbeing, youth education and support for young carers. We work with the most disadvantaged and at-risk young people. The young people we work with include those who are homeless, are exiting the Care and Protection system or have contact with the Juvenile Justice system. Our aim is to provide them with stable housing, and mentoring in life skills to re-engage with school or undertake training to be work ready.



### Sarah's Story

From the moment Sarah found out she was pregnant, her life became focused around providing for her daughter. Three month old Stephanie is the light of her life.

As a 20-year-old single mother, Sarah says she would not have overcome the challenges of pregnancy or looking after a baby without the help of The Junction Youth Health Services. Sarah was assisted by the health professionals and youth workers at the centre who gave her care and support throughout her pregnancy and let her know she wasn't alone.

"I like that it's aimed at younger people. I prefer it here, I felt more comfortable. I don't like hospitals and I don't like doctors at all actually but coming here I don't have issues – it's not like going to the doctor, it's like visiting a friend," says Sarah. "I would suggest to any young mum to take up this service."

***Your bequest can ensure young parents and their children can have access to health care and support as they establish themselves in a critical stage of life.***



YOUTH +  
FAMILY

## Family Services

Anglicare focuses on a range of community specific services to enhance the capacity of parents to care for their children and prevent the need for statutory interventions. This requires a strong commitment to developing family support and intervention programs to enable parents to enhance their capacities to provide nurturing, safe and stable care for their children.



### Juanita's Story

Juanita's passion to help other Indigenous people has led her on a journey with Anglicare Riverina's parenting program.

The Wiradjuri mother of three was given the opportunity to become a parenting tutor. She is now one of two Indigenous tutors helping to deliver the home based parenting and early childhood enrichment program, while also participating with her four year-old son Kye.

"I love helping families and I love children", she said. "Being Indigenous also helps because I have a strong relationship with the community after living in Wagga for 11 years."

"It's about giving my son a better future. I've noticed a big difference in his behaviour."

The number of Indigenous families engaging in the program has increased as a result of Juanita's involvement, helping to improve parent's involvement in their children's education. Our solution is empowering and supporting parents to keep their children safe, well and to build their school readiness.

We work with the most disadvantaged and at-risk families. These are families that are homeless or whose children are at risk of entering the Care and Protection system.

*Your bequest can help parents and caregivers to give their children the best start to life.*



DISABILITY  
SERVICES

## Disability Services

**A**nglicare supports people with disability (particularly young people with disability) to manage life stage transitions. Anglicare provides personalised care services for people living with disability. We work with our clients to develop plans for their futures based on their individual needs and preferences. We aim to develop participants' skills so they can engage in life-enhancing activities including, where possible, employment. Anglicare also provides other lifestyle assistance such as respite and accommodation support.



### Jess' Story

Eighteen-year-old Jess is a regular visitor to Anglicare's Disability Services Centre in Canberra, which provides skill development for clients as well as opportunities for social connection. The centre gives young people with a disability the opportunity to learn things like cooking, catering and other skills which helps them engage in their community, especially in regard to finding employment and moving towards independent living.

"I love it here! It's a really fun place. And I love the staff. They are the best," says Jess, who was born with Down Syndrome. "I feel happy when I come here. It's fun. I have lots of friends and I have lots of support."

***Your bequest can further assist young people living with disabilities to be equipped and empowered as included members of their community.***





HOUSING +  
CRISIS SUPPORT

## Homelessness Services

Anglicare is a strong advocate for the rights of all people to have safe, appropriate and affordable housing as a basic human right. There are increasing difficulties that families and individuals in our Homelessness Services face including family violence, mental health issues and drug and alcohol abuse, and our skilled staff respond to the needs of these highly vulnerable people with respect and dignity.



### **Tanya's Story**

Last year, Tanya, a single mother of five from rural NSW, experienced one of her darkest moments. With spiralling mental health issues, growing debt of more than \$10,000 and unable to even pay gas or electricity, she and her children faced the terrifying prospect of being homeless. With Anglicare's help with financial planning and budgeting, Tanya was able to halve her debt, and enrolled in a TAFE course to improve her employment prospects.

"I had severe rent arrears...", said Tanya. "I was terrified of becoming homeless... The patient, caring and helpful employees at Anglicare made a real difference in my life, and the lives of my children. We have hope for the future because of Anglicare," she says.

***Your bequest can help ensure vulnerable children, families and individuals aren't left without the safety and security of affordable and appropriate housing.***



**Some of the other vital programs that Anglicare provides are:**

- Foster Care
- Early Childhood Education + Care Centres
- Disaster Recovery
- Financial Counselling
- Gambling Help
- Emergency Relief

A bequest to Anglicare is a loving investment in the future of some of our most vulnerable community members. If you choose to leave a gift in your Will to Anglicare, you are ensuring programs like these continue to change lives.

It is a gift of hope that will never be forgotten.





## Choosing the Gift of a Lifetime

If you have not yet made a Will, or if you are looking at reviewing your existing one, you should know that there are a number of different ways to make a gift in your Will. Such gifts are known as legacies, or bequests. To help you choose the one that suits you best, we've provided a list of the most common forms of legacy together with a brief explanation of each one.



### **A Gift of Nominated Percentage of Your Estate**

A gift of fixed percentage of your estate (often known as a "proportional legacy") allows you to nominate a specific percentage of your estate to Anglicare. A legacy of this kind does not depend on your estate being of any set value or size and it is flexible enough to allow for changes, whether it grows or decreases in value, your decision as to the proportions will always remain the same.

### **The correct wording for such a gift is –**

'I give (free of all duties) to Anglicare NSW South, NSW West & ACT, in the Anglican Diocese of Canberra and Goulburn, (here to enter the amount or percentage) to be used for the work of Anglicare NSW South, NSW West & ACT. The receipt of the proper Officer for the time being of Anglicare NSW South, NSW West & ACT shall be full and sufficient release and discharge to my Trustee for the same.

### **A Gift of a Specific Sum of Money or Specific Assets**

A gift of a specific sum of money or specific assets in the form of property, shares or articles of value (often known as "specific legacy") enables you to have the full use of your assets during your lifetime. An advantage of this form of bequest is that it gives you the comfort of being certain about exactly how your estate will be divided.



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This is a common legacy, however certain considerations need to be taken into account. Firstly, when you make your Will, you will have no way of knowing what the value of your estate will be. Secondly, with inflation the value of your gift may change. In order to maintain the value of your gift you may need to revise your Will on a regular basis.

**The correct wording for such a gift in –**

*"I ..... give and bequeath to Anglicare NSW South, NSW West & ACT, free of all duties, the following (whichever is applicable):*

- *the sum of \$*
- *Property (details)*
- *or other assets (details)*

*And I direct that the receipt of the Proper Officer shall be sufficient to discharge my Executor for the Bequest which is to be applied to the general purposes of Anglicare NSW South, NSW West & ACT - ABN 69 198 255 076. I recognise that Anglicare has DGR status and can offer tax benefits for bequests."*

**A Gift of Nominated Percentage of the Remainder of Your Estate**

A gift of a remainder of your estate (often known as a 'residuary bequest') allows you to make specific gifts to family and friends and leave the whole or portion of what remains of your estate to Anglicare.

**The correct wording for such a gift is –**

*"I .....devise and bequeath to Anglicare NSW South, NSW West & ACT, free of all duties the residue of my Estate and I direct that the receipt of the Proper Officer of Anglicare NSW South, NSW West & ACT shall be sufficient discharge to my Executor for the Bequest which is to be applied to the general purposes of Anglicare NSW South, NSW West & ACT - ABN 69 198 255 076. I recognise that Anglicare has DGR status and can offer tax benefits for bequests."*





### **A Gift Which Recognises Your Wishes for Two Beneficiaries**

This is a 'contingency bequest' because it recognises your wishes for two beneficiaries (perhaps a member of your own family and Anglicare) to benefit from the same part of your Estate. Often it refers to the whole Estate. This is a 'contingent gift' because the money or assets that you nominate will only pass to Anglicare if a certain event happens. The most common circumstance is when a person leaves their estate to a partner for lifetime use. Afterwards the estate can become the property of another beneficiary, often a charity such as Anglicare.

We recommend that specific legal advice be sought to ensure the wording of your Will is appropriate for your wishes.

### **A Gift to Anglicare through a Trust Created Under Your Will**

You can use a Trust to make a gift to Anglicare through your Will. Firstly you may choose to create a fund which entitles a friend or family member to receive the interest from the fund during their lifetime. Upon their death the fund can pass to Anglicare. Alternatively, you may prefer Anglicare to receive interest on the fund for a specific number of years. After this period the fund then passes on to a nominated beneficiary.

We recommend that specific legal advice be sought to establish a Trust and ensure the wording of your Will is appropriate for your Trust circumstances.



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### **A Specific Gift**

You may nominate a specific Anglicare program to benefit from your gift, for example, Emergency Relief. Please be aware however that your gift may not be able to be fulfilled if the program is no longer running when the bequest is made. Also, gifts for specific items are often difficult as the cost of the item is likely to change between nominating the gift and the gift being realised. Where there is a difference, Anglicare will do its best to ensure the intent of the gift is still achieved.

### **The correct wording for such a gift is –**

*"I wish to give and bequeath to Anglicare NSW South, NSW West & ACT, the sum of \$..... specifically for: (whichever is applicable)*

- *Item 1*
- *Item 2*
- *Item 3*

*And I direct that the receipt of the Proper Officer of Anglicare NSW South, NSW West & ACT shall be sufficient discharge to my Executor for the Bequest which is to be applied to the general purposes of Anglicare NSW South, NSW West & ACT - ABN 69 198 255 076. I recognise that Anglicare has DGR status and can offer tax benefits for bequests."*

### **A Gift to a Specific Anglicare Region/ Service**

You may wish to benefit a specific Anglicare Region/Service from your estate. In such cases, all of your gift will benefit the nominated Region or Service and Anglicare acts to ensure that your gift has the maximum long term benefit through its national buying power and investment options.

### **The correct wording for such a gift is –**

*"I wish to give the sum of \$..... to Anglicare NSW South, NSW West & ACT specifically for ....., and I direct that the receipt of the Proper Officer of Anglicare NSW South, NSW West & ACT shall be sufficient discharge to my Executor for the Bequest which is to be applied to the general purposes of Anglicare NSW South, NSW West & ACT - ABN 69 198 255 076. I recognise that Anglicare has DGR status and can offer tax benefits for bequests."*

### **Amending Your Will**

If you already have a Will and you would like to make a simple addition, you may add a Codicil to your existing Will. A Codicil is a legal term for a document which forms a part of your Will.

If you make a Codicil, you simply need to use the same wording as you would use if you were writing a new Will.









We would welcome the opportunity to discuss with you further about the good work of Anglicare and how to leave a gift in your will.

If you have already decided to leave a legacy gift, we would appreciate the opportunity to thank you for your generosity.

Please contact us -

**Philanthropy Team**

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“...give what you have decided in your heart to give...”

– 2 Corinthians 9:7