

Bequest Information for Solicitors

Discussion with your client

1. Please ensure the correct wording is used and include our full name Seton Villa and ABN 90 0500 41926
2. Our Bequest Policy is to hold monies in a legacy reserve for allocation to capital projects as determined by the Board from time to time. If a client wants the donation to be specific to an area or service, we would be happy to accommodate their wishes. If you need to discuss a specific request, please contact us.
3. If your client would like to establish a legacy in recognition or memory of a loved one, we would encourage you to contact us to discuss the opportunity.

Suggested wording for wills

'I (insert name here) bequeath to Seton Villa ABN 90 0500 41926 for its general purposes (or name a specific purpose)

[Choose and insert the appropriate statement from the list below]

1. **the whole of my estate**
 2. *(insert number)* **percentage of my estate**
 3. **the residue of my estate**
 4. **the amount of \$ (insert the value of your gift in cash)**
 5. **my (insert name of asset)**
- free of all duties, and the receipt of the CEO or other authorised officer for the time being shall be a complete and sufficient discharge for the Executor(s).'**

Words in italics to be adjusted in an accordance with testator's wishes.

Administration of an estate

When it is time to administer an estate in which a gift has been left to Seton Villa, we would appreciate your assistance in the following ways:

1. Notify us – Please notify us of the gift in the will. We ask that you also provide us a copy of the will or probate for the estate as this allows us to match the testator to our donor records and also identifies any restrictions attached to the use of the bequest.
2. Tell us about your client – We would like to have an opportunity to thank the testator's family and friends.

The actions allow us to respect your client's final wishes, honour their memory and maximise the impact of their donation.



A work of the
Daughters of Charity
of St Vincent de Paul

For any enquiries regarding the administration of an estate (or if you wish to send a cheque for a bequest to us) please contact:

Chief Executive Officer
Seton Villa
A: 162a Balaclava Road, Marsfield NSW 2122
E: CEO@setonvilla.org.au
P: 02 9888 5244