



Your gift to those who
gave the greatest sacrifice



This is your opportunity to **make a lasting tribute** to the heroic men and women who gave their lives in service to our country. A gift in your Will ensures that our veterans' families are taken care of and their **sacrifices are never forgotten.**



Who will you support?

By leaving a gift in your Will to Legacy, you can **provide a lifeline** to the loved ones of our Australian military personnel for years to come.

CHILDREN AND FAMILIES

In addition to thousands of widow/ers, Legacy cares for over 500 children across Australia. We offer a range of support to these families including:

- ✔ Financial assistance for accommodation, domestic assistance and childcare.
- ✔ Grants, scholarships, mentorship programs, adventure activities and holiday camps.



AGEING & VULNERABLE WIDOW/ERS

Legacy ensures that widow/ers are not disadvantaged by their partner's service. Our support includes:

- ✔ Loans, grants and allowances.
- ✔ Help with heating or cooling the home, medical emergency alarm systems and access to community transport.

BENEFICIARIES WITH DISABILITIES

When a young child or adult with a disability is dependant on a veteran, Legacy will be there to assist them through their lives. We provide:

- ✔ Social activities with a focus on personal growth and development.
- ✔ Employment and education opportunities mobility aids and lifestyle options.



Lee's story

Lee Smith was born with Leber Congenital Amaurosis (LCA), a rare inherited eye disorder that causes severe vision loss at birth. She was just four years old when her father passed away from cancer.

“At that time, the Department of Veterans’ Affairs didn’t recognise cancer as an illness caused by the war, so my mother wasn’t eligible for the war widow/er’s pension or any other financial help. That’s when Legacy stepped in.”

At the age of seven, Lee enrolled at a boarding school for students with disabilities. It was there she learnt braille and how to use a white cane. Notably, Lee remembers Legacy purchasing her first braille writing machine, which allowed her to develop her reading and writing skills.

In adulthood, Legacy provided Lee with over \$5,000 for new furniture, secure fencing for the backyard, a reclining chair to assist with her migraines, and a personal emergency response alarm system.

“Sometimes, I hear funny noises in the middle of the night, and it can be a bit scary,” she said.

“The alarm also comes with a combination lock for my front door, so emergency services can get in if I’m not able to get to the door.”



Relying on just a pension to get by, Lee is also **“greatly thankful”** for Legacy’s assistance in covering her private health insurance costs. Lee, who has ongoing depression and anxiety, says she uses this health insurance to pay for her regular respite treatment in a private psychiatric hospital.

“I took out health insurance when I was working, but I’m not well enough to work anymore, so it was becoming a struggle to pay for it on a pension,” she said.

“Legacy took over the payments four years ago, and I get many thousands of dollars of use out of that otherwise, who knows how long I would have been able to keep it up. **It’s absolutely essential to me.**”

How to leave a gift in your Will

No matter how big or small, a gift in your Will is a simple yet powerful way to **make an impact** on the lives of those we serve.

01

SPEAK TO YOUR LOVED ONES

Writing or updating a Will is a personal decision. If you are planning to leave a gift to Legacy, consider letting your family know.

02

DECIDE YOUR GIFT

There are three main ways to leave a gift in your Will to Legacy.

▶ **Residual**

You can make a gift of the remainder, or a percentage of the remainder, of your estate once your loved ones have been looked after.

▶ **Specific**

You can make a specific bequest by stating the dollar amount in your Will to leave to Legacy.

▶ **Asset**

You can leave us a gift of a specific asset, for example real estate, shares or bonds or an item of particular value.

03

SPEAK TO A SOLICITOR

A professional solicitor can assist you in making your Will or adding a codicil – a short legal amendment – to your existing Will.

04

CONSIDER LETTING US KNOW

While we understand updating your Will is a private matter, we'd love the opportunity to thank you for your generous decision.



Your Will is an opportunity to leave a lasting legacy

Our Impact

Your support allows us to be there in times of hardship, helping those we serve to grow and thrive despite adversity.

\$5 MILLION +

SPENT ON BENEFICIARY SERVICES IN 2022.



Social outings



Legacy camps



Financial assistance



Educational grants
& scholarships



Childcare support



Emergency
accommodation

Today, the partners and children of those fallen or injured in service to their country are facing social and financial distress. Your gift plays a vital role in supporting numerous individuals throughout NSW.



Barry's Generous Gift to Legacy

Barry Crispe's journey with Legacy began in the 1970s when he actively participated in fundraising activities organised by his local Torch Bearers, a group active at the time dedicated to supporting Legacy's mission.

However, his commitment to Legacy did not wane. Recognising the ongoing needs of veterans' families, he transitioned to become a regular donor, along with his wife, Lee, when he later married. When it came time to consider making his Will, Barry made the **profound decision to extend his support for Legacy beyond his lifetime by becoming a bequestor.**

In his own words, Barry emphasises the societal responsibility to care for the families of veterans: "I feel that all Australians have an obligation to support the families of our Defence Force personnel who have given their lives or their health."

"These families shouldn't suffer disadvantage because of their loss. It's wonderful that Legacy is there for them whilst they get back on their feet."

"I think a lot of people seem to think that Legacy's work will come to an end time once all widows from World War Two pass away, but that's not the case," he added.

Through his bequest, Barry sends a powerful message encouraging others to consider a similar show of solidarity.



His belief in Legacy's enduring impact serves as an inspiration for individuals to reflect on their own capacity to contribute, not just in the present but for generations to come.

"By leaving a gift to Legacy, I know they will be there for the families of veterans for the long term," he said.

Through Barry's story, we are reminded that each contribution plays a vital role in being there for the families of those who have also made immense sacrifices for our country.



LEGACY[®]
Support Our Veterans' Families

\$5 \$10 \$20 \$50 5 Pins
5 Wristbands
BUY A TAX DEDUCTIBLE BADGE AND KEEP THE PROMISE

Reynolds

Legacy
\$20
Support Our Veterans' Families

Legacy
\$20
Support Our Veterans' Families

Shirley's story

For 90-year-old Shirley McLaren, attending social events on her own following the death of her husband, Korean War veteran Roy McLaren, was a lonely experience.

"You do everything as a couple, and I found attending as a single person was not the most comfortable of situations," she recalls.

Fast forward 50 years, and Shirley is the first to work her way around the room and introduce herself at the monthly Legacy lunches and morning teas she religiously attends.

"They are lovely social get-togethers with all the ladies. Those sorts of friendships are something that I value and look forward to."

"At the end of the day, we're humans, and we love to socialise."

For many Legacy widows in their senior years, a Legacy morning tea or lunch might be their only outing. They look

forward to these occasions and enjoy the companionship.

This is especially true for Shirley. With her three children, five grandchildren and ten great-grandchildren all living interstate, she'd often find herself "talking to the same four walls".

Social isolation has serious and disabling consequences. A phone call from a Legacy volunteer offers an unintrusive means of connecting with beneficiaries, no matter the distance.

"During the COVID-19 lockdown, I was in constant contact with my Legatee via email and telephone," Shirley said.

"She was really good at picking up the phone and asking how I am. I often pick up the phone and ring her as well."

“

That sort of contact is excellent. It lifts the spirits.



Become part of *The Promise Society*



The Promise Society is an esteemed and exclusive club reserved for those who have **made the extraordinary commitment** to leave us a gift in their Will.

As a member of The Promise Society you're not just a donor; you're a visionary, shaping the future of our organisation for generations to come. In recognition of your generosity, we extend to you a host of benefits befitting your status as a Promise Society member.

INVITATIONS TO SPECIAL LEGACY EVENTS:

As a member of The Promise Society, you'll receive invitations to our most exclusive events, where you'll have the opportunity to engage with fellow donors and witness first-hand the impact of your generosity.

CERTIFICATE OF APPRECIATION

Display your commitment proudly with a personalised certificate, acknowledging your membership in The Promise Society. It serves as a tangible symbol of your dedication to veterans' families.

EXCLUSIVE NEWSLETTER UPDATES

Stay informed and inspired with our members-only newsletter, curated specifically for supporters like you. Receive regular updates on our initiatives, success stories and opportunities to deepen your involvement and make an even greater difference.

HAVE YOUR SAY

As a member of The Promise Society, you'll have access to unique ways to engage with our work, whether through volunteer opportunities, special projects or strategic partnerships.

Your voice is invaluable to us, and we're committed to ensuring that you play an integral role in shaping our future.



FAQs

Is having a Will important?

Dying intestate is what it means to die without a Will. Each state has laws that will determine how your assets will be distributed which could cause some of your loved ones and the causes you may care about from being excluded or left out. An up-to-date Will is the only way to ensure that your wishes will be carried out as you wanted after you pass away. You must be over 18 in Australia to make a legal binding Will.

What type of gift is best to leave Legacy?

A percentage/residual gift from your estate is what is left after you have taken care of your loved ones. You can use this type of gift to support your friends and loved ones and causes that you care about. Residual gifts are the simplest and most practical way of leaving a gift in your Will. Other types of gifts, such as specific items or pecuniary gifts, can devalue over time. The value of a residual gift may not be known as it is a percentage of your entire estate. This type of gift keeps up with inflation so your gift to the charity is maximised.

I already have a Will. Do I need to make a new one?

If you already have a Will you might need to update it from time to time as circumstances can change. Your Will should reflect your current wishes. If you are not sure, you should ask a solicitor if the changes you wish to make on your current Will can be done with a codicil (a short legal amendment to your Will) or if you need to make a new one.

Can I specify where my gift goes?

Yes, you can specify where you want your gift to go. It is worth remembering that gifts in Wills are usually not realised for many years. If your gift is left for general purposes, then it can be applied to the area in most need and can make the most impact. If you do want to specify, please call us before you make your Will, and we can ensure that your wishes are carried out.

What if I need to look after my loved ones?

In your Will, your priority should be your loved ones. We would be grateful at Legacy for any gift that you may leave us. We recommend that you talk to your loved ones about your Will, so they understand why you are leaving a gift to a charity. This communication will ensure that your final wishes are carried out as you intended.

Can I leave my house, other property, or shares?

Yes. To ensure we can accept your gift, please talk to us before you make your Will as it enables us to make sure your wishes can be carried out. We need to be able to convert property and shares into cash to fund our programs.

Do I need to tell you about leaving a gift to Legacy in my Will?

You don't have to, but we would love to know so we can thank you for your generosity and keep you updated on our programs throughout Legacy. We respect your privacy and will keep your information confidential.

Preparing your Will

We strongly recommend that you consult a legal professional when you create or update your Will.

Correct wording to leave Legacy a gift in your Will:

'I give to Legacy Club Services (ABN 22000048868) of Level 8, 35 Clarence Street, Sydney, NSW 2000 (the residue of my estate OR _____ % of the residue of my estate OR the sum of \$_____) free of all duties and testamentary expenses to be used for its general purposes. I direct that a receipt from Legacy Club Services shall be a sufficient discharge to the executor of my Will.'

NEED ASSISTANCE?

☎ 1800 LEGACY (534 229)

✉ bequests@legacyclubservices.org.au



DISCLAIMER

Whilst this publication has been carefully prepared it is written in general terms and is intended as general information and to provide commentary. It does not purport to be comprehensive or render any advice. No one should rely on information contained in this publication without first obtaining professional advice relevant to their specific situation. The publisher, Legacy Club Services, its employees or any other persons involved in its preparation and distribution expressly disclaim any liability to any person in respect of the publication, distribution and any consequences arising from its use.



Get in touch today

Our community of supporters play an important role in ensuring that the partners and children of veterans who gave their lives or health in recognised military service can fully realise their potential.

If you have a passion for supporting our veterans and their families, we encourage you to join us in our mission.

Together we can give back to the families of those who have given so much to our country.



 @LegacyAustralia

 @Legacy-Australia

 @LegacyAust

CONTACT US

 1800 LEGACY (534 229)

 www.legacy.com.au

 bequests@legacyclubservices.org.au