

Wording for your Will



Please take this to your solicitor when the time is right.

The correct wording to use to make a gift in a new Will:

Once you have decided to leave a gift in your Will to the Father Atanasio Gonelli Charitable Fund, we suggest your solicitor uses words such as those below if you do not already have a Will.

"I give to the Father Atanasio Gonelli Charitable Fund Inc. (ABN 50 226 002 702), for its general purposes, free of all duties, the sum of \$_____, for which an authorised receipt from the Father Atanasio Gonelli Charitable Fund Inc. will be sufficient discharge for the executor(s) or trustee."

The correct wording to use to make a gift in an existing Will – Codicil

If your Will was written within the last 5 years, simply ask your solicitor to add a codicil. A codicil is a document made after the signing of your Will, with the intention to alter one or some provisions contained in your Will. To add a codicil in your Will, simply give this document with our suggested wording to your solicitor.

"I (your name) of (your address) declare this to be a (first or other) codicil to my Will dated (date of Will). In addition to any legacies given in my said Will, I will give the Father Atanasio Gonelli Charitable Fund Inc. (ABN 50 226 002 702), the sum of \$_____, which I direct to be paid free from all expenses and duties of whatever kind and I express the wish that: A. this Bequest be used for general purposes; or B. such sum be used to support _____. I declare that the receipt issued by the Father Atanasio Gonelli Charitable Fund Inc. in respect of this Bequest shall be a full and sufficient discharge to my trustee. In all other respects I confirm my said Will and any previous codicils thereto."

If you choose to leave a gift in your Will to the Father Atanasio Gonelli Charitable Fund, we'd be very grateful if you could let us know, as we'd welcome the opportunity to thank you personally. We'd also like to reassure you that we will always protect your privacy and respect how you prefer to hear from us and about our Charity's projects.

Information for Solicitors and Executors

Deductible Gift Recipient Status

The Father Atanasio Gonelli Charitable Fund Inc. (ABN 50 226 002 702) holds Deductible Gift Recipient (DGR) Status Item 1 and is fully Tax Exempt.

Capital Gains Tax on estate assets & transfer of shares 'in specie'

As the Father Atanasio Gonelli Charitable Fund Inc. is fully Tax Exempt, the transfer of all Capital Gains Tax assets such as real estate or shares to the Father Atanasio Gonelli Charitable Fund Inc. will result in significantly reduced tax liability, rather than pre-selling those assets by executors and transferring the sale proceeds.

