

## Suggested wording when leaving a gift in your Will to the School

*If you would like to leave a gift in your Will to Trinity Grammar School, Kew we have provided the following clauses for your consideration. It is recommended that you seek independent legal advice when drafting your Will, as tax, among other things, may need to be considered depending on the recipient and the assets bequeathed.*

### 1. Bequest to specific fund

I GIVE [my whole estate] or [the residue of my estate] or [X% of the residue of my estate] or [the sum of \$..... to [Trinity Grammar School, Kew **Building Fund**] or [Trinity Grammar School, Kew **Scholarship Fund**] of 40 Charles Street, Kew Vic 3101. I DECLARE that the receipt of the Director of Business or other authorised officer for the time being of Trinity Grammar School, Kew shall be a sufficient discharge to my trustees.

### 2. Unrestricted Bequest to Trinity Grammar School, Kew

I GIVE [my whole estate] or [the residue of my estate] or [X% of the residue of my estate] or [the sum of \$..... to Trinity Grammar School, Kew 40 Charles Street, Kew Vic 3101. I DECLARE that the receipt of the Director of Business or other authorised officer for the time being of Trinity Grammar School, Kew shall be a sufficient discharge to my trustees.

\*If you gift a specific property in your will and you do not own that property at your date of death because it has been sold by you or your power of attorney or your administrator the gift will fail. A gift of a set sum of money or a share in your residuary estate is less likely to fail.



### 3. A gift of a specific investment or item to Trinity Grammar School, Kew

I GIVE

- all my shares in publicly listed companies to Trinity Grammar School, Kew 40 Charles Street, Kew Vic 3101 for application as part of its endowment fund. I DECLARE that the receipt of the Treasurer or other authorised officer for the time being of Trinity Grammar School, Kew shall be a sufficient discharge to my trustees.
- all my shares in XXX Pty Ltd to Trinity Grammar School, Kew 40 Charles Street, Kew Vic 3101 for application as part of its endowment fund and I DECLARE that the receipt of the Treasurer or other authorised officer for the time being of Trinity Grammar School, Kew shall be a sufficient discharge to my trustees.
- my artwork known as ..... (title) by .....(artist) to Trinity Grammar School, Kew Foundation 40 Charles Street, Kew Vic 3101 Road, Kew, Victoria for application as part of its endowment fund and I DECLARE that the receipt of the Treasurer or other authorised officer for the time being of Trinity Grammar School, Kew shall be a sufficient discharge to my trustees.

TRINITY GRAMMAR SCHOOL, KEW

40 Charles Street, Kew Victoria 3101 Australia p: +61 3 9854 3600 e: trinity@trinity.vic.edu.au w: trinity.vic.edu.au

ABN 13 004 056 660 | CRICOS 00350M



#### 4. The use of your gift

*Rather than simply giving an asset or money to Trinity Grammar School, Kew for application as part of its trust you may prefer to be more specific in your directions about the use of your donation. We understand that some donors are particularly motivated to give to causes. However, if the directions given to the School are overly prescriptive it may be difficult to apply the gift in the most effective way or in the way you intend.*

The following are some examples if you wish to be more specific in your giving:

I GIVE .....

to Trinity Grammar School of 40 Charles Street, Kew Vic 3101. I DECLARE that the receipt of the Treasurer or other authorised officer for the time being of Trinity Grammar School, Kew shall be a sufficient discharge to my trustees, and I express the wish that my gift be used for (please circle):

- the provision of student well-being programmes, and or the provision of associated resources including, but not limited to, dedicated materials, services, and professional support to ensure student well-being at Trinity Grammar School; or
- the provision of scholarships to students who would not otherwise able to attend Trinity Grammar School, Kew due to the financial circumstances of their parents or guardians; or
- in the provision of music tuition and programs, and the provision of associated resources including, but not limited to, instruments, dedicated buildings and performance and rehearsal spaces; travel and accommodation; or
- the development of sporting facilities or to be applied towards sporting pursuits by students; or
- the development, replacement or maintenance of the Trinity Grammar School buildings and grounds.

No matter the size of your gift or where it is to be directed, every bequest strengthens the school now and in the future.



**CODICIL FORM**  
***TO ADD TO AN EXISTING WILL – PLEASE RETAIN***

**I, (full name)**

**Of, (address)**

**Declare this to be a Codicil of my Will that is dated (date of your Will)**

**I GIVE \***

In all other respects, I confirm my will.

**SIGNED** by the Testator in our presence and attested by us in the presence of the Testator and of each other.

**Signature:**

**Today's date:**

Witnesses by the following persons who have signed their names in the presence of each other and of the persons named on the left.

<b>(Name of Witness)</b>	<b>(Name of Witness)</b>
<b>(Signature of Witness)</b>	<b>(Signature of Witness)</b>
<b>(Address of Witness)</b>	<b>(Address of Witness)</b>
<b>(Occupation)</b>	<b>(Occupation)</b>

**Notes**

1. Your original signed codicil should be stored with your original signed will;
2. If you prefer to give a share of your residuary estate rather than a fixed sum of money we recommend that you consult your lawyer to incorporate your gift in a revised will;
3. The witnesses to your codicil must be present when you sign the codicil and they must sign in your presence and the presence of each other. It is best to use the same pen.
4. it is recommended that you obtain legal advice in relation to this codicil.

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