



Bequest Guide

**With your  
bequest I can  
achieve so  
much.**

**yooralla**  
choosequality



## Our Vision

A world where people with disability are equal citizens.

## Our Mission

To provide quality, sustainable and flexible services that uphold human rights and create opportunities, empowering individuals to live the life they choose.

## Education

Established in 1918, Yooralla is one of Australia's largest and most proactive organisations working to support people with disability to live independent and fulfilling lives. Yooralla values the right of every person, irrespective of age, gender, financial circumstance or level of disability, to access high-quality services that will allow them to achieve their goals.

Yooralla's services are developed in partnership with people with disability and in many cases, their families and carers. We provide essential services for people of all ages and disability, regardless of whether a person is born with or acquires a disability as the result of accident, ill health or age.

Our services cover every aspect of living, both practical and aspirational. We provide a range of accommodation alternatives, respite, in-home support, therapy, attendant care, specialised equipment, employment, recreation, information, education and training, and practical skills for daily living. Yooralla's success is driven by a diverse community of professional, support staff and volunteers dedicated to empowering people to achieve the outcomes that they desire.

**Your will,  
your way.**

## Importance of a will.

A will is a document that states how you would like your assets to be distributed after you die. Passing on your assets is one of the most personal and significant decisions you can make, and yet, nearly 50 percent of Australians don't have a will in place.

### Why is a legal will important?

Having a clearly-written, up-to-date, legal will is important for a number of reasons. It can:

- ensure the right people are provided for when you die
- enable your assets to be distributed according to your wishes
- eliminate disagreements among those who expect to benefit from your estate
- help those who are responsible for managing your estate understand how you would like your affairs managed
- enable your estate to be settled quickly.

The absence of an up-to-date will can leave your estate open to dispute and litigation, which can be a difficult situation for everyone involved.

This bequest guide is intended to help answer your questions about wills and leaving a bequest to Yooralla, and includes information such as:

- what Yooralla can achieve with your bequest
- different types of bequests
- bequest wording
- a will checklist
- how to include a bequest to Yooralla
- testimonials
- a response form.

This guide does not substitute or replace the advice of legal professionals. It is important to seek the guidance of a qualified solicitor or trustee when making your will.

A young boy with dark hair and a hearing aid is looking at a book. A large blue circular graphic is overlaid on the left side of the image, containing the text 'Supporting families.'

**Supporting families.**

## What Yooralla can achieve with your bequest.

A bequest to Yooralla in your will ensures that we can continue to deliver essential services and programs to people with disability and their family.

Your bequest will help Yooralla support people with disability to live independent and fulfilling lives long after your lifetime. Bequests help us to support people with disability to do everyday things like communicate, increase mobility, enjoy education, employment and living independently.

The best way to help is to make a bequest 'for general purposes'. Your gift can then be used where it's needed most.

If you would prefer your gift be used for a specific purpose, please contact us so we can ensure your wishes are met.

A bequest to Yooralla leaves a lasting legacy, helping to support and improve the lives of thousands of people with disability for decades to come.



**Achievement.**

## Different types of bequests.

There are many ways to leave a gift to Yooralla while still caring for your own family.

Leaving a bequest is simple. Anyone can include a bequest in their will, which may take one of several forms:

1. Whole of your estate.
2. Residual – after family and friends are provided for, the remainder can be left as a bequest.
3. Percentage – a percentage of the estate could be left as a bequest.
4. Asset – a specific asset, such as property or shares could be left as a bequest.
5. Cash amount – a specific cash amount can be left as a bequest.
6. Living bequest – instead of leaving a gift in your will, you can give it in your lifetime.

Most importantly, remember to review your will every few years to ensure it still reflects your current wishes and keep a copy of your will in a safe location.



Independence.

## Your will checklist.

Preparing a will provides peace of mind knowing your estate is in order.

1. List the names and contact details of all your intended beneficiaries:

Family  Friends  Charity

2. List relevant information about your assets, for example:

- real estate, your own home and investment properties
- bank accounts – record all relevant account information
- life insurance policies
- superannuation
- shares
- bonds or debentures
- cars, caravan or boat
- furniture, household, personal items
- jewellery
- collections, artworks, stamps, coins, model cars and trains
- overseas assets.

3. Make a list of how you want to distribute your assets, intended beneficiaries, the amount, percentage or residue of your estate.
4. Contact a solicitor or trustee to arrange your will to be written or updated.

**For further information, please contact Yooralla's Bequest Manager on 1800 666 010 for a more detailed brochure and a personal record book to list your estate details in full.**



Choices.

## A bequest to Yooralla.

How to include Yooralla in your will.

Once you have decided on the type of bequest you would like to make, we suggest you visit a solicitor or trustee.

As a guide the following wording may be used in your will:

**'I give to Yooralla ABN 14 005 304 432**

**(Please insert the appropriate statement)**

- **The whole on my estate**
- **Percentage of my estate**
- **The residue or percentage of my estate**
- **The sum of \$**

**free of any relevant duties or taxes for its general purposes. The official receipt of the organisation shall be full and sufficient discharge of my bequest.'**

If you intend to leave a bequest to Yooralla, it would be our preference that you inform us, so we can take the opportunity to thank you and keep you up to date with our work.

However, you may ask your solicitor to inform us on your behalf, your confidentiality will be respected.



**On Tuesday morning, eight families are gathered in a toy-filled room. Zaineb is sitting with her mother Ammoun, singing along to some of her favourite nursery rhymes. “Zaineb loves music,” says Ammoun.**

## Be inspired by the people we support.

### Zaineb Houssien

Zaineb was born with a rare bone disease and underwent a bone marrow transplant at five months old. Zaineb was in isolation for six months after her transplant, which was successful, but she was left with a physical disability and severe visual impairment. At the age of one, Zaineb was unable to sit and, following a referral from her oncologist, started working with Yooralla occupational therapists and physiotherapists.

“The staff have been excellent and really helpful — particularly when organising equipment,” says Ammoun.

Now five, Zaineb is learning how to walk. Ammoun sees Zaineb’s physical development as a sign of her strength and determination.

“She wants to walk — you can see it. Our family’s next goal is to see her walk unassisted,” says Ammoun.

Every week, Ammoun and Zaineb come to Glenroy to attend MyTime, a Yooralla group that provides support for parents and carers of children with disability or chronic medical conditions. As one of Yooralla’s play assistants runs a session with the children, carers gather to socialise and get information about the services and support in their area.

This focus on carers is what makes MyTime unique, and it’s something Ammoun appreciates.

“I fit in at MyTime,” says Ammoun. “The other parents are more understanding because they know what you’re going through.”

Zaineb will start at Glenroy Specialist School next year. When she does, Ammoun and Zaineb will no longer attend MyTime. Ammoun is excited about this new chapter, knowing that the relationships they’ve formed with other families, as well as their relationship with Yooralla, will continue into the future.



A bequest to Yooralla is a personal gift of great importance and a lasting legacy supporting people with disability.

## Contact us

If you have already arranged to leave a gift in your will to Yooralla, please let us know as we would like to thank you personally.

If you are considering leaving a bequest to Yooralla in your will or if you would like to talk about what is involved, please contact our Bequest Manager on 1800 666 010. Alternatively, please complete this form and return to:

**Yooralla**  
**PO Box 200**  
**Flinders Lane**  
**Victoria 8009**

- I have already included Yooralla in my will
- I intend to include Yooralla in my will
- I would like you to contact me to discuss leaving a bequest
- Please send me more information about leaving a bequest.

Title	Given Name	Last Name	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address			
<input type="text"/>			
Suburb		Postcode	State
<input type="text"/>		<input type="text"/>	<input type="text"/>
Phone		Mobile	
<input type="text"/>		<input type="text"/>	
Email			
<input type="text"/>			

All communications are in the strictest confidence. Yooralla respects your privacy and honours your gift with the care, sensitivity and respect it deserves.



'A world where people with disability are equal citizens'.

## Contact us

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For more information, please contact Yooralla.

### Postal Address

PO Box 200, Flinders Lane Victoria 8009

### Address

244 Flinders Street, Melbourne Victoria 3000

**Tel:** 1800 666 010 **Fax:** (03) 9916 5704

**Email:** [bequest@yooralla.com.au](mailto:bequest@yooralla.com.au)

**Web:** [www.yooralla.com.au](http://www.yooralla.com.au)

**ABN:** 14 005 304 432

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### Need language help?

Contact the Translating and Interpreting Service (TIS) on 13 14 50

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