

Leaving a Legacy



Leaving a gift to Foundation Barossa through your Will, is a powerful way to support the organisations or causes you care about for future generations.

A bequest is simply a gift that is written in your Will. It can be a gift of cash, property shares or other investments.

Foundation Barossa can ensure your legacy supports causes that meet your wishes. Our team can work with you and your advisers to put your charitable bequest in place and ensure your gift is used as intended.

Example wording for your Will is available on our website. It is important to get independent advice to ensure that your wishes are clearly expressed and meet legal requirements.

You can make a lasting legacy through Foundation Barossa in three ways

1. Foundation Barossa

A gift of any amount to Foundation Barossa's Education Fund, Barossa Community Fund, Our Culture Fund or Disaster Recovery Fund.

2. Existing Sub-fund

A gift of any amount to a Foundation Barossa existing named fund, whose areas of interest you would like to support.

3. Your own Sub-fund

Establish a new Sub-fund with specific areas of interest or organisations identified for future granting. We can discuss with you the minimum amount required.

Different Types of Bequests



Pecuniary Bequest

A fixed amount specified in a Will.



Residuary Bequest

The remaining value of an estate when all other bequests to family and friends have been made and liabilities have been paid.



Reversionary Bequest

Allows a surviving partner to benefit from your estate during their lifetime and then for the balance of the estate to be paid to Foundation Barossa upon their death.

Acknowledging Your Gift

We like to honour the legacy of donors by acknowledging gifts left by individuals and/or funds on our website and in printed materials. It is also important for us to be able to tell grant recipients where the gift came from. However, we also value your privacy and will seek permission prior to any public acknowledgement.



Education Fund

Education scholarships support students in the Barossa who may have a barrier to study. The scholarships strive to ensure that a student's circumstances do not hinder their aspirations.

- Kicking Goals Scholarship
- Concordis Social Inclusion Scholarship
- Barossa Bands Scholarship
- Elderton Winemaking Scholarship
- Thomas Scholarship
- Dr Ben Baker Memorial Scholarship
- Barossa Co-op Traineeship
- Fran Clancy Memorial Scholarship

As at 2024: \$1,500,000
Goal: \$3,000,000



Barossa Community Fund

Building a vital community in which everyone can participate and contribute.

- Community Grants
- Brighter Beginnings
- Youth Literacy (Imagination Library)
- Youth Homelessness prevention
- Wellbeing Fund
- Domestic Violence
- Emergency Housing

As at 2024: \$500,000
Goal: \$15,000,000



Our Culture Fund

Nurture and sustain the artistic and cultural fabric of the Barossa by providing access and education to a wide range of arts and cultural activities.

- Peter Lehmann Arts & Education Trust

As at 2024: \$498,000
Goal: \$15,000,000



Disaster Recovery Fund

Provide support to the community during emergencies and fund initiatives after unexpected events like natural disasters, pandemics, or other crises.

Currently Unfunded
Goal: \$1,000,000

Fees and Charges

To assist with ongoing costs, Foundation Barossa charges an administration fee. This provides the necessary resources to operate ensuring fiscal responsibility in grant due diligence, community fund awareness, research, reporting, compliance, and other activities to help beneficiaries and accelerate change in our community. Fees are applied based on total corpus fund held as of 30 June, calculated on 1 July.

There is a \$500 establishment fee to set up a new named fund. Current administration fees of 2% applies to funds under \$1.5m and 1.5% for funds over \$1.5m.