

# INSTRUCTIONS TO MY SOLICITOR: LEAVING A GIFT IN MY WILL

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Please include in my Will a provision to the effect of:

- I give the sum of \$ \_\_\_\_\_ to Foundation Barossa.
- I give the remainder of my estate to Foundation Barossa.
- I give \_\_\_\_\_ (*describe the asset*) to my  
Trustee to sell or convert into money and give the proceeds to Foundation Barossa.

to be applied to:

- |  |   |
|--|---|
| <input type="checkbox"/> Barossa Bands Scholarship                     | <input type="checkbox"/> Kicking Goals (students with a disability) |
| <input type="checkbox"/> <u>Concordis</u> Social Inclusion Scholarship | <input type="checkbox"/> Thomas Scholarship (tertiary students)     |
| <input type="checkbox"/> Dr Ben Baker Memorial Scholarship             | <input type="checkbox"/> Peter Lehmann Arts & Education Trust       |
| <input type="checkbox"/> Elderton Winemaking Excellence Scholarship    | <input type="checkbox"/> Public Fund (Community Grants)             |
| <input type="checkbox"/> Homburg Homelessness Prevention Fund          | <input type="checkbox"/> Open Fund                                  |
- A new named sub-fund to be called: \_\_\_\_\_

*Please note that a new sub-fund will only be established if the Donor contacts Foundation Barossa to discuss their intentions.*

If no program is advised, your gift will be held in the Open Fund and will support the operations of Foundation Barossa.

It is important to include the full legal name of **Barossa Region Community Foundation Inc** and registered **Australian Business Number, ABN 38 559 475 274**

## Letting Foundation Barossa know

Making a Will is a very personal matter, but if you have included Foundation Barossa in your Will, or are considering doing so, it is helpful to let them know.

This gives the Foundation the opportunity to thank you for your gift, understand your preferences for how your gift is to be used, and to ensure that Foundation Barossa is able to respect your attitude to public recognition.

- I give my permission for you to advise Foundation Barossa that they will be a beneficiary in my Will.
- I would like Foundation Barossa to contact me to understand my preferences for how my gift is to be used.

All bequest information is, of course, held in the utmost of confidence.

Annabelle Elton-Martin  
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Barossa Region Community Foundation Inc

