

Bequest Policy

Careline Connections (Careline) relies on the generosity of donors to support its work.

Bequests are a means by which donors can provide support beyond their lifetime.

Purpose

This policy is established by the Board of Careline Connections to guide staff and assist donors in achieving the best possible outcomes for Careline.

Bequests to Careline are managed in accordance with the terms of the bequest for achieving the goals set by the Careline Board.

Guidance for those making a bequest

The Careline Board invites those considering making a bequest to engage with Careline staff to determine what needs a planned bequest might address.

Careline recommends that you seek independent professional advice from a lawyer or financial advisor about your bequest options.

The following sample wording for different forms of bequests may help in your discussions with your family or your advisor.

I give, free of all duties and taxes, [insert description of bequest] to Careline Connections ABN 32 635 974 757 for the use and benefit of Careline Connections at its absolute discretion. The receipt of the General Manager or Board Chair or other authorised officer shall be an absolute discharge to my executors for the gift.

Possibilities for description of bequest:

- “the sum of [amount] Australian dollars”
- “the residue of my estate” OR “[insert number] percent of the residue of my estate”
- “the whole of my estate” OR “[insert number] percent of my estate”
- Details of non-tangible assets (for example, shares)

Careline Connections reserves the right to decline or return a bequest which does not align with Careline’s objectives or values.