



Eternally Humpty

*the gift of life*

# Bequests

*Eternally Humpty has been established for a special group of like-minded people who have pledged a bequest to The Humpty Dumpty Foundation in their Wills.*

*The Humpty Dumpty Foundation is a children's charity that was founded in 1996 by Executive Chairman & Founder Paul Francis OAM. The Humpty Dumpty Foundation purchases essential and often life-saving medical equipment for neonatal units and children's hospital wards across Australia. The Humpty Dumpty Foundation currently provides equipment support to over 210 hospitals and health services.*

*The Humpty Dumpty Foundation does not receive any form of regular government funding and solely relies on the generous support of the community to continue its work.*

*The Humpty Dumpty Foundation would be honoured to be considered to be included in your Will and carry your legacy for many years to come.*

## How to provide a bequest to The Humpty Dumpty Foundation

You may choose to provide *The Humpty Dumpty Foundation* with one of the following bequests in your Will:

### Pecuniary Bequest

This is a gift of a specified amount of money, for example \$5,000.

### Residual Bequest

This is the remainder of your estate after all other bequests and expenses have been deducted.

### Whole Estate

It is open to you to give your whole estate to the Foundation.

We recommend you discuss the type of bequest you intend to provide to the *The Humpty Dumpty Foundation* with your family and solicitor prior to finalising your Will.

Further information has been included overleaf should you decide to Bequest to our Foundation.

*The Humpty Dumpty Foundation* has been endorsed by the Australian Taxation Office as a deductible gift recipient and an income tax exempt charitable entity for tax purposes.

*If you would like to learn more about The Humpty Foundation and how your bequest will make an enduring impact on future generations please call Paul Francis on 02 9439 0511 or email Paul directly at [paul.francis@humpty.com.au](mailto:paul.francis@humpty.com.au).*



# Wording for a General Bequest



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Thank you for your interest in including a bequest to *The Humpty Dumpty Foundation* in your Will. To ensure that your gift is valid, we recommend that you use the following wording in the clause dealing with distribution of assets in your Will. You may wish to give this wording to the solicitor who is preparing your Will.

## Pecuniary Bequest

This clause must be inserted prior to any clause dealing with "the residue of your estate".

*"[number paragraph, e.g. (a) or (b)]*

*Subject to the preceding trusts:*

*(i) to give [describe amount]:*

*(A) to the charity by the name of Humpty Dumpty Foundation Limited (ABN: 47 402 442 321), known as the Humpty Dumpty Foundation, in aid of that institution;*

*(B) if the gift in (A) cannot take effect completely or at all, to the extent that it cannot take effect: to the charitable organisation or organisations in Australia which my executors in their discretion consider most nearly fulfil or fulfil the objects I intend to benefit in the share or shares my executors think fit;*

*(ii) the receipt of the treasurer, secretary or public officer for the time being of a beneficiary under this provision is a sufficient discharge to my executors in respect of a gift to that beneficiary."*

## Residual Bequest

This clause must be the last clause dealing with the distribution of assets in your Will so that it captures the entire residue of your estate.

*"[number paragraph, e.g. (a) or (b)]*

*Subject to the preceding trusts:*

*(i) to give the residue of my estate:*

*(A) to the charity by the name of Humpty Dumpty Foundation Limited (ABN: 47 402 442 321), known as the Humpty Dumpty Foundation, in aid of that institution;*

*(B) if the gift in (A) cannot take effect completely or at all, to the extent that it cannot take effect: to the charitable organisation or organisations in Australia which my executors in their discretion consider most nearly fulfil or fulfil the objects I intend to benefit in the share or shares my executors think fit;*

*(ii) the receipt of the treasurer, secretary or public officer for the time being of a beneficiary under this provision is a sufficient discharge to my executors in respect of a gift to that beneficiary."*

## Whole Estate

*"[number paragraph, e.g. (a) or (b)]*

*(i) I give my whole estate:*

*(A) to the charity by the name of Humpty Dumpty Foundation Limited (ABN: 47 402 442 321), known as the Humpty Dumpty Foundation, in aid of that institution;*

*(B) if the gift in (A) cannot take effect completely or at all, to the extent that it cannot take effect: to the charitable organisation or organisations in Australia which my executors in their discretion consider most nearly fulfil or fulfil the objects I intend to benefit in the share or shares my executors think fit;*

*(ii) The receipt of the treasurer, secretary or public officer for the time being of a beneficiary under this provision is a sufficient discharge to my executors in respect of a gift to that beneficiary."*

## Specific Purpose Bequest

You can also specify what Hospital you would like your bequest to assist, for example, Royal North Shore Newborn Intensive Care Unit. To do this, simply insert the following wording at the end of paragraph (i)(A):

*"for use in the areas of most need, at the discretion of the Executive Chairman & Founder of [insert name of hospital you would like to assist]."*