

PLANNED GIVING

BEYOND ARTHRITIS

Arthritis
NEW SOUTH WALES



YOUR LASTING GIFT

Your legacy

Thank you for considering leaving a gift in your Will. Your legacy will create opportunities to provide life changing services for people of all ages living with arthritis, the most significant cause of chronic pain and disability in Australia.

Where your gift will assist:

- **Camp Footloose and Camp Twinkletoes** help reduce the isolation experienced by children with juvenile arthritis, providing an opportunity to participate in fun and educational activities in a safe and supportive environment.
- **Community Education Sessions** advance the effective self-management of arthritis through lifestyle, nutrition and gentle exercise.
- **Gentle Exercise Programs**, such as Warm Water Exercise and Strength & Balance Exercise classes, help keep people with arthritis active and moving by improving joint functionality, building muscle strength and core stability, and reducing overall pain.
- **Awareness Programs** promote the prevention and early diagnosis of arthritis for better health outcomes.



Our promises

When you leave a gift in your Will, **Arthritis & Osteoporosis NSW** makes these promises to you:

- We will use your gift carefully and wisely where it can have the greatest impact
- Your gift will be managed with sensitivity and respect
- We understand that your family and loved ones always come first.

"We received a Kay Stubbs Scholarship to fund maths tutoring for our son Daman when he was nine years old. He had experienced long absences from school due to joint pain and treatment and thanks to the scholarship he caught up on missed concepts which moved him back towards the top of his maths class."

Jo Cassar, mum to Daman diagnosed at age 4 in 2011 with polyarticular arthritis, a beneficiary of the Kay Stubbs bequest

There are several ways in which you can choose to leave a gift to Arthritis & Osteoporosis NSW. The types of gifts for your consideration are:

A Pecuniary Gift: a specific financial amount

A Residuary Gift: the remainder of your estate after specific gifts to family and loved ones have been disbursed.

A Percentage Gift: either a percentage of the residue of your estate or a percentage of your entire estate

The Gift of an Asset: this could include real estate, shares, bonds or other articles of value

We recommend that you discuss your wishes with your loved ones and consult a legal professional when you create or update your Will.

Inform us of your gift

We would love to know that you have included Arthritis NSW in your Will so that we can discuss any wishes you may have and to give you options for how your generosity can be acknowledged.

You can let us know by calling our Relationships Manager 02 9857 3300 or email bequests@arthritisnsw.org.au



Our suggested wording for including a gift to the Arthritis NSW in you Will is:

"I give free of all duties or taxes...
[Please insert here the appropriate statement selected from the 6 options below:]

1. **the whole of my estate**
2. [insert number] **percent of my estate**
3. **the residue of my estate**
4. [insert number] **percent of the residue of my estate**
5. **the sum of \$ [insert value of your gift]**
6. [insert number] **of my [insert name of shares] shares.**

...to Arthritis NSW (ABN 64 528 634 894) for its general purposes. The official receipt of the organisation shall be a full and sufficient discharge to my executor."

For executors

Information for Executors

Every gift we receive, no matter how big or small, helps us in our work towards *Freedom from Arthritis*, osteoporosis and related musculoskeletal conditions. We're very thankful to everyone who helps to administer a gift left to Arthritis NSW in a Will.

As an Executor to an estate which has named Arthritis NSW as a charitable beneficiary, you are uniquely placed to ensure that the last wishes of someone close to you are carried out. If you have a solicitor acting on your behalf, please provide this information to them.

Your role is an important one which can sometimes be time-consuming and complex. We're here to answer any questions you may have about distributing a gift to Arthritis NSW. Information we need when the time comes, please send the following documents relating to the gift:

- A copy of the last Will, along with any codicils
- Details of the next of kin or surviving close friends so that we can write to thank them and answer any of their questions.



Residuary Gifts

If Arthritis NSW is named as a beneficiary of the residuary of the estate or a proportion of the entire estate, please also send the additional information:

- Grant of Probate
- Copy of Statement of Assets and Liabilities
- Statement of distributions
- Upon completion of the estate administration, a copy of the Estate Accounts.

Distribution of Gift

When you are in a position to distribute the gift from the estate, please make cheques payable to Arthritis NSW, sent to the attention of our Relationships Manager.

Our postal address is:

Attention: Relationships Manager
Arthritis NSW
Locked Bag 2216, North Ryde NSW 1670

Alternatively, if you prefer to make distributions via EFT directly into our bank account, please contact on 1300 194 196 for the correct bank account details.

If you are considering making an interim distribution from the Estate before all of the estate administration is completed, please contact the Planned Giving Team on 02 9857 3300 to discuss in more detail.

Please feel free to contact us on 02 9857 3300 or at bequests@arthritismsw.org.au to ask us any questions or to talk about how to distribute gifts in Wills to Arthritis NSW.

Thank you

Leaving a gift in your Will is a very personal decision, and perhaps the greatest commitment you can make to help people living with arthritis and related musculoskeletal conditions.

We look forward to discussing the various options with you.

Contact our Relationships Manager on 02 9857 3300 or bequests@arthritismsw.org.au

If you want more information about arthritis or our services, please visit arthritismsw.org.au



Your gift to Arthritis & Osteoporosis NSW will make a difference in the lives of current and future generations impacted by arthritis, osteoporosis and related musculoskeletal conditions.

Please complete the form below and return to:

Arthritis & Osteoporosis NSW
Locked Bag 2216 North Ryde NSW 2113

Please tick ✓ the appropriate box

- I have included Arthritis & Osteoporosis in my Will and would like to speak with someone
- I intend to include Arthritis & Osteoporosis in my Will and would like to speak with someone
- Please contact me, I would like more information about leaving a gift to Arthritis & Osteoporosis NSW in my Will

Name _____

Address _____

State _____ Postcode _____

Telephone _____

Email _____

Please note: All information provided to AONSW is treated in the strictest confidence

Arthritis
& Osteoporosis
NEW SOUTH WALES
- SINCE 1967 -



Our Vision
Freedom from Arthritis

Arthritis InfoLine: 1800 011 041

Phone: 02 9857 3300

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www.facebook.com/ArthritisNSW/

www.arthritisnsw.org.au

Support our work

As a non-government charitable organisation, we rely on the generosity of our donors, sponsors, members and other supporters to help us deliver our valuable services.



ABN: 64 528 634 894
CFN: 12845