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## BEQUEST FACT SHEET

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### How can I leave money in my will to the Community Impact Foundation?

There are three different ways that you can leave money in your will to the Community Impact Foundation.

#### 1. Establish a sub-fund

If you would like to establish a sub-fund, the minimum amount required to do so is \$50,000. The Donation Form allows you to nominate a successor so that they can continue to make donation recommendations on your behalf, or you can nominate the foundation's trustees. The below will need to be inserted into your will.

*"I give (X) of my (residuary) estate to the trustee the COMMUNITY IMPACT FOUNDATION (**the Foundation**) (ABN 43 260 612 561) of Level 9, 8 Spring Street, Sydney, established by deed dated 4 December 2014 (Deed) to be held by the Trustee of the Foundation on the trusts declared for the Foundation in the Deed and any variation of the Deed.*

*Without creating a binding legal obligation, I express the wish that my bequest to the Foundation be held in the (NAME OF SUB-FUND) within the trusts of the Foundation.*

*The receipt of the executive officer or other authorised officer or trustee for the time being of the Foundation will be a full discharge to the executor/trustee of my will."*

**Please complete this [form](#) to establish a new sub-fund.**

#### 2. Contribute to an established sub-fund

This requires a minimum amount of \$5,000. You will need to insert the same clause into your will as above, naming the already established sub-fund.

**Please complete this [form](#) to donate to a specific sub-fund.**

#### 3. To make a general donation to the foundation.

This does not require a minimum amount. This means that you do not create a sub-fund and you will not be able to make any charitable donation recommendations. The trustees will use this money for general charitable purposes. The below will need to be inserted into your will.

*"I give (X) of my (residuary) estate to the trustee the COMMUNITY IMPACT FOUNDATION (**the Foundation**) (ABN 43 260 612 561) of Level 9, 8 Spring Street, Sydney, established by deed dated 4*

*December 2014 (Deed) to be held by the Trustee of the Foundation on the trusts declared for the Foundation in the Deed and any variation of the Deed.*

*The receipt of the executive officer or other authorised officer or trustee for the time being of the Foundation will be a full discharge to the executor/trustee of my will.”*

***PLEASE NOTE: The information and data presented here is not intended as legal advice. We strongly recommend that you consult your estate planning lawyer before making any decisions.***