COMMUNITY IMPACT FOUNDATION

BEQUEST FACT SHEET

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

There are 3 different ways that you can leave money in your will to the Community Impact Foundation. With all three options, we need to receive from you a completed Donation Form (attached) so that we can be sure to follow your wishes.

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."

2. Contribute to someone else's 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.

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.

COMMUNITY IMPACT FOUNDATION

DONATION FORM

Donor 1

Title

First Name: **Last Name:**

Postal Address:

Suburb: **State:** **Postcode:**

Phone (daytime): **Mobile:**

Email address:

Donor 2 (optional)

Title

First Name: **Last Name:**

Postal Address:

Suburb: **State:** **Postcode:**

Phone (daytime): **Mobile:**

Email address:

Donation Details

Amount you wish to donate: (minimum $50,000 is required to establish a new sub-fund)

This donation is made:

(please tick)

☐ **To establish a new sub-fund in the Community Impact Foundation**

Name you would like your sub-fund recorded as:

Please note that sub-funds cannot include the word "Foundation", or "Fund". However, the words "Bequest", "Gift" or "Endowment" are all acceptable.

Do you wish grants from your sub-fund to remain anonymous?

Yes ☐ No ☐

☐ **To contribute to a specific sub-fund in the Community Impact Foundation.**

Please specify the name of the sub-fund:

☐ **To the Community Impact Foundation for its general charitable purposes. I do not wish to establish a sub-fund.**

Successor Nomination (optional)

Indicate below the details of the person you nominate to take over grant recommendations in the case of your death or if you experience mental incapacity or other legal disability.

Title

First Name: **Last Name:**

Postal Address:

Suburb: **State:** **Postcode:**

Phone (daytime): **Mobile:**

Email address:

Payment Methods

Cheque

If you are paying by cheque, please forward this completed application form and your cheque, made payable to **Community Impact Foundation**, to the address shown below.

Electronic Funds Transfer

If you are directly depositing funds, payment details are as follows:

Account Name: Community Impact Foundation
BSB: 182-512
Account Number: 963206727
Reference: Sub-fund name (as nominated above)
You should mail, email or deliver this application form to us immediately so that we can match the details with your deposit.

A tax deductible receipt will be sent to you upon receipt of your payment. If the funds have come from someone else and the receipt should be in a different name to your name stated above, please advise us.

Where to send your application

Community Impact Foundation

L8, 1 York St, Sydney NSW 2000

Phone: 02 9413 4404

Email: info@communityimpactfoundation.com.au

Processing your application

When we receive your money, whether to initially establish a sub-fund or to add to an existing sub-fund, no investment earnings (whether positive or negative) will accrue to the sub-fund until the commencement of the following month.

Acknowledgement (please tick)

- ☐ I have read the attached brochure for the Community Impact Foundation and agree to be bound by the provisions of the Deed of Trust and any other additional terms and conditions contained in this brochure.
- ☐ I understand that any donation once accepted by the Trustee represents an irrevocable donation to the Community Impact Foundation and is not refundable to me/us.
- ☐ I certify that I will not receive any benefit, directly or indirectly, from the charitable or community organisations recommended to receive grants from my/our sub-fund.
- ☐ I understand that the Trustee ultimately decides which eligible organisations will benefit from each sub-fund and is under no legal obligation to follow my/our recommendation.

Signature: **Date:**

Name:

Signature: **Date:**

Name: