



*Give the gift of a lifetime...*

# **GIFTS IN WILLS HANDBOOK**

**Prince of Wales Hospital Foundation**



**“We found all the staff to be kind,  
compassionate, caring and very  
dedicated to their profession.  
Some are now friends.”**

**GIFT IN WILL FOUNDATION SUPPORTER**

**JOHN CARBERY**

# PRINCE OF WALES HOSPITAL FOUNDATION GIFTS IN WILLS HANDBOOK

A message from our Director of Generosity	5
What is a Will?	6
Why do I need a Will?	6
What if I don't have a Will?	8
What if I already have a Will?	8
What do Wills contain?	10
Where should I keep my Will?	10
When do I update my Will?	11
How do I leave a gift in my Will?	11
Supporter Story – Mayli Ooi	12
Supporter Story – John Carbery	13
The difference that your gift in Will makes	14
Prince of Wales Hospital Foundation	15
Nightingale Solicitor Program	16
Free Will Service	16
Nightingale Society	17
Supporter Story – Barry Mathers	18
Supporter Story – Antony Eriksen	19
Thank You	20
Will Wording	21
Planned Giving	23
Glossary of Terms	25
Your Personal Information	28

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**“I truly trust the Foundation to correctly make use of the funds raised to improve the care of patients in the Hospital.”**

**GIFT IN WILL SUPPORTER MAYLI OOI**

## A MESSAGE FROM OUR DIRECTOR OF GENEROSITY

The Prince of Wales Hospital Foundation Ltd is the established health promotion charity supporting the Prince of Wales Hospital located in Randwick, New South Wales.

When you receive care at the Prince of Wales Hospital, you are being looked after at one of Australia's leading teaching and tertiary care referral centers. The Prince of Wales Hospital Foundation, with the generosity of our community and supporters, continues to invest in the future of healthcare to ensure the best care possible for patients at The Prince of Wales Hospital.

Our Hospital's history is steeped in generosity. The magnificent sandstone buildings on the campus are the former Asylum for Destitute Children, Randwick and were constructed in the 1850s thanks to a bequest left by the institution's Dr. Alexander Cuthill. The good doctor with great zeal fulfilled the duties of medical attendant at the asylum. He was however mortally wounded by a mentally unwell local man, and on his deathbed bequeathed the bulk of his fortune, amounting to more than £11,000, for the care of people in his community.

Generous gifts like this have played a vital role in contributing to infrastructure like the ward in the patient centric Prince of Wales

Hospital Nelune Comprehensive Cancer centre, equipment in our Emergency Department, ground breaking research into the impact of delirium on the aged and how to minimise its effects as well as many other vital projects and medical research.

We are always grateful when the Foundation is provided with a Gift in Will (Bequest) and we consider it to be the greatest privilege to fulfil the last wishes of those who generously think of others when updating their Wills. Our friendly team is always available to assist you through this important decision-making process and can provide whatever information and support would be useful.

For those who have already left a Gift in their Will to the Foundation, we thank you. You are helping to future proof the healthcare needs of the community and your support will always be remembered and valued.

**WENDY FARROW**  
*DIRECTOR OF GENEROSITY*



# WHAT IS A WILL?

A Will is a legal document that sets out how your estate is to be distributed after your death. Under the Will, an Executor is appointed who will be responsible for looking after your estate.

## The executor will:



**Collect all your estate assets**



**Pay all your debts**



**Distribute your estate as per your Will**

Your Will comes into legal effect after you have passed away, so having a legally valid and up-to-date Will with clear instructions is the best way to ensure your assets will be dispersed according to your wishes.

Your Will is one of the most important documents you will sign, so it's advisable that you have it prepared by a legal professional.

Some people may find it difficult to think about their own mortality and of dying but try to do it as early as possible and keep your Will updated, as major life changes occur around you.

A Will is a definitive statement of your intentions when it comes to your wishes for both your 'estate' assets as well as your interment.

# WHY DO I NEED A WILL?

A valid and current Will is of vital importance in managing our personal affairs. Around 50% of Australians will pass away without a valid Will. A legal Will provides the means of ensuring that your possessions are passed on to family, friends and organisations of your choosing.



**“We love that our gift will help others in the future get the best care possible.”**

**KURT AND LEONIE  
HAVE LEFT THE FOUNDATION  
A GIFT IN THEIR WILLS**

## WHAT IF I DON'T HAVE A WILL?

If you die without a Will (known as “dying intestate”), the Government in each State or Territory decides how your estate assets will be distributed, which is usually done by the implementation of a set formula.

The outcome of this process may not match up with how you would have decided to disperse your assets.

If you don't have a current and up to date Will you could leave your family with additional expenses and/or distress in the settlement of your estate.

Having a current and up to date Will is one task that should never be left for another day.

**One of the most important documents that you will sign in your lifetime is your Will.**

## WHAT IF I ALREADY HAVE A WILL?

If you have a Will already, it's a good idea to confirm that your Will:

- **Was produced by a Solicitor and set out correctly.**
- **Is current and updated – what was the date of the last update?**
- **Looks after your family and loved ones.**
- **Clearly states your wishes for your estate.**
- **Includes a provision for all outstanding debts to be paid.**
- **Was witnessed by two people when you signed it.**
- **Is stored in a safe place and you have informed people of where it is located.**
- **Has an Executor appointed and that person knows where your Will is located.**
- **Has listed the Charities that you wish to support.**



## WHAT DO WILLS CONTAIN?

There are several important things to consider and decisions to make before you have a Will drafted:

- **Including your loved ones and friends**
- **Looking after your children and spouse**
- **Providing a gift to the charities you support**
- **You will also need to think about what assets make up your Estate, who you want to have them and how they should be distributed**
- **How your estate is to be handled**
- **The people or person that you nominate in your Will to handle your estate after you've passed - Executors**
- **Funeral arrangements**

Separate to your Will, many people have found it helpful to list all their personal details in one document, such as:

- **Bank accounts**
- **Car registration**
- **Medicare and**
- **Insurances**
- **Centrelink details**
- **Health insurance**
- **Superannuation**
- **Solicitor**

See detailed lists on page 28 for your convenience. If you do fill out the lists be sure that you have informed people of where it is kept.

## WHERE SHOULD I KEEP MY WILL?

It is important to have a current Will and it is just as important that you make some people aware of where your Will is kept. Your Will should be kept in a safe location.

Before a Will can be put into effect it first must be able to be located, just knowing that there is a current Will doesn't help if no-one knows where it is.

## WHEN DO I UPDATE MY WILL?

Your Will reflects your wishes at the time your Will is written so it is advisable to review and update your Will as your circumstances change so that it reflects your wishes at that point in time. It is recommended that you review your Will at least every five years or whenever there are changes to your circumstances, for example:

- **Marriage**
- **Birth of children, grandchildren or great grandchildren**
- **Death of a spouse or child**
- **Death of a benefactor or your Executor**
- **Divorce**
- **Changes to the assets in your estate**

## HOW DO I LEAVE A GIFT IN MY WILL?

A wonderful way to acknowledge the care given to you or a loved one at Prince of Wales Hospital is with a gift in your Will. Once you have taken care of your family and loved ones, your gift to the Prince of Wales Hospital Foundation can take several forms:



**The residue of your estate**



**A percentage of the value of your estate**



**A specific amount of money, an item or life insurance\***

\*Items such as shares, paintings or property can be left to the Foundation.

**Free Will Service – See page 16 for further details.**

## SUPPORTER STORY: MAYLI OOI

“... the best thing I could do to show my appreciation was to include a gift in my Will to the Foundation.”

I have experienced on a number of occasions the amazing care given by the doctors and nurses at Prince of Wales Hospital, when I arrived in Sydney from Malaysia I was pregnant with my daughter and soon after my arrival I had my first contact with the Hospital who provided me with much needed information and support.

In May of 2010 I was under the care of Prof. Sommerville from the Neurology Department and required an operation which was successful. In December 2010 I became ill again and was rushed to Hospital.

My return to work was structured to allow me to cope without over doing things and it took three long years before I was able to return to fulltime employment. I know that without the support of Prof. Zagami and his team I would have

been unemployed and unable to provide for my children.

I am so appreciative of the fact that the Hospital and the Foundation is there to continue to support and assist with the health needs of the community that in 2016 I decided to do something to give back to the Hospital for all that they had done for me. The best thing I could do to show my appreciation was to include a gift in my Will to the Foundation.

I am hoping that you will join me in remembering the Foundation with a gift in your Will. I truly trust the Foundation to correctly make use of the funds raised to improve the care of patients in the Hospital. Together we can help change lives.



**MAYLI OOI**

*GIFT IN WILL FOUNDATION SUPPORTER*

## SUPPORTER STORY: JOHN CARBERY

“I ask that you give consideration to leaving a gift in your Will to the Foundation, it will be very much appreciated.”

I am writing to urge members of our community to support the Foundation.

I have had a long association with Prince of Wales Hospital due to living nearby for 46 years. My partner, of 48 years, recently passed away in the Hospital.

Over the last few years he had numerous admissions to the Hospital via the Emergency Department due to complications of heart failure. Because of this we had many dealings with the doctors, nurses and associated specialties, mainly in the Emergency Department and Geriatric Wards. We found all the staff to be kind, compassionate, caring and very dedicated to their profession.

We decided, prior to Brian's death, that I should leave my estate

to the Foundation. As there are no dependents, the decision was easy.

We have had a good and interesting life, together, for a large part, working in the music industry. Initially as country representatives selling recorded music to shops in regional NSW, the metropolitan area and then the city. Finally, ending up in the production and warehousing of recorded music.

Because the Hospital campus is expanding to help meet the future needs of the community, so will the demand increase on the Foundation, for funding the future of health. I ask that you give consideration to leaving a gift in your Will to the Foundation, it will be very much appreciated.



**JOHN CARBERY**

*GIFT IN WILL FOUNDATION SUPPORTER*

# THE DIFFERENCE THAT YOUR GIFT IN WILL MAKES

Your gift will have a direct impact on future generations of patients and staff at the Prince of Wales Hospital in many ways.



## Breakthrough Research and Innovation

The Prince of Wales Hospital is one of Australia's premier major teaching hospitals serving all of New South Wales with an average of 50,000 admissions per year. Your gift allows the Foundation to invest in critical research projects to drive knowledge of the causes, prevention, treatment and control of diseases.



## Equipment

Your gift helps the Foundation to invest in upgrading and supplementing major equipment for the best patient care and technological innovations across the Hospital to ensure high quality patient care such as a new Hybrid Operating Suite which enables scanning work to take place in a surgical platform and is invaluable for vascular surgery.



## Creating a Healthier Community

The Foundation recognises that dealing with disease or health concerns without prior knowledge can be extremely traumatic and overwhelming. The generosity of a gift enables the Foundation to support the development of various initiatives to assist and encourage the dissemination of information relating to health and disease.



## Building Expertise in Healthcare Delivery

The Foundation recognises the need to invest in human resources to drive innovation and high-quality patient care. The gift you leave in your Will supports the Foundation with the professional development and growth of Hospital staff.



## Future-Proofing Hospital Infrastructure

Your compassion and foresight in leaving a gift in your Will assists the Hospital expansion as part of the Randwick Campus Redevelopment. The Foundation is focusing particularly on the integration of cutting-edge technology into Prince of Wales Hospital aligned with its vision of becoming a virtual hospital.

# PRINCE OF WALES HOSPITAL FOUNDATION

The Foundation is the established health promotion charity supporting Prince of Wales Hospital Randwick.

Since 2004, the Foundation has raised vital funds and awareness for the continued development of health promotion, research, education, equipment, facilities and special projects at Prince of Wales Hospital.

The Prince of Wales Hospital Foundation seeks to future-proof healthcare by connecting generosity to innovation and excellence at the Prince of Wales Hospital.

With the generosity of our community and our supporters, we are investing in the future of health to ensure the best care possible for patients at Prince of Wales Hospital.

It is with the assistance of our supporters that we can help in so many ways. We are grateful for the opportunity to be able to assist across all aspects of Prince of Wales Hospital and we wish to thank all those who make this possible.

The Foundation has had significant impact on the delivery of health services for the community and the building and renovation of major hospital facilities.

The Foundation funded close to 1,000 pieces of equipment, the delivery of more than 50 health promotion campaigns, funding of more than 75 life-saving bodies of research, and enabling more than 50 clinicians to attend professional development opportunities.

Improved community health outcomes include reduced mortality rates, reduced waiting time and length of stay, and increased patient and staff satisfaction with their experience at Prince of Wales Hospital.

**We are grateful for the opportunity to be able to provide vital support across all aspects of Prince of Wales Hospital.**

# NIGHTINGALE SOLICITOR PROGRAM

Statistics show that 50 percent of Australians will pass away without a valid Will. We are working with a range of Solicitors to help our valued supporters make or update their Will **free of charge** with a friendly professional company.

These solicitors have generously accepted an invitation to be a Nightingale Solicitor for the Prince of Wales Hospital Foundation. They have agreed to, subject to some restrictions, write a simple Will or a codicil (a change or addition) to an existing Will free of charge\* for a benefactor who has decided to leave a gift in their Will to the Prince of Wales Hospital Foundation.

We can introduce you to a range of solicitors in your area via a letter and you can then make contact directly with the solicitors and arrange to meet with the solicitor of your choice at a mutually convenient day and time. Your meeting with the solicitor, the details of your discussions and your Will are strictly confidential.

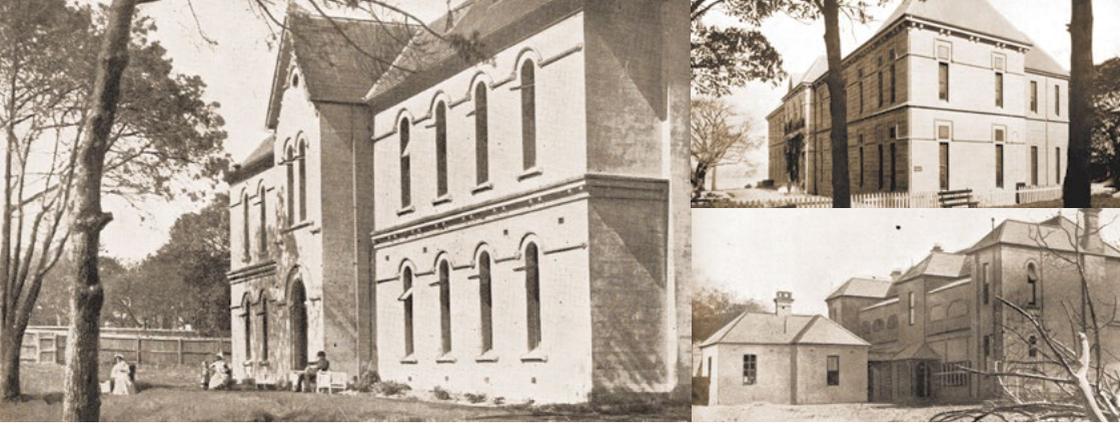
Including a gift in your Will is a wonderfully generous way to make a difference to many lives in the future without impacting on your life today.

We extend to you an invitation to advise us when you have made a gift in Will provision to the Prince of Wales Hospital Foundation which will enable us to welcome you into our benefactor's group, the Nightingale Society.

If you would like to take advantage of this free service or if you have any questions or require further information, please contact 02 9382 4263 or [hello@powhf.org.au](mailto:hello@powhf.org.au)

## FREE WILL SERVICE

The Nightingale Solicitors have agreed, subject to some restrictions, to write a simple Will or a codicil to an existing Will free of charge for a benefactor who has decided to leave a gift in their Will to the Prince of Wales Hospital Foundation.



## NIGHTINGALE SOCIETY

The Nightingale Society is a group of generous and visionary Foundation friends united by one common goal to improve patient care by including a gift in their Will to the Prince of Wales Hospital Foundation. We have taken the name for our Society from Florence Nightingale “The Lady with the Lamp”. Members of the Nightingale Society are a very special part of the Foundation family and will enjoy:

- **Exclusive invitations to special lunches, talks with Hospital specialists, tours and events**
- **Regular updates on our work**
- **Direct access to our Planned Giving Manager for information and support**

Prince of Wales Hospital has a long and proud association with Florence Nightingale the founder of modern nursing. One of our original buildings, the Catherine Hayes building, was built to plans approved by Florence in 1870. The Hospital also has a proud tradition of receiving bequests from its supporters. The first Hospital building, the Edmund Blackett, was built with a £6,000 bequest from a local doctor in 1854.

As a member of the Nightingale Society you will receive a certificate of membership, a letter of thanks, a copy of our latest Annual Report and a Nightingale Society badge.

One of the greatest benefits of the Nightingale Society is that we can thank people in their own lifetime for their generosity and support.



## SUPPORTER STORY: BARRY MATHERS

“An affair to remember with Prince of Wales Hospital.”

Prince of Wales is a great Hospital serving the Sydney area and beyond.

Like all hospitals Prince of Wales Hospital always needs more finances, besides what it receives from Government funding so I hope the telling of my story will inspire you to leave a gift in your Will for the Hospital

My affair with the Prince of Wales Hospital started 60 years ago when I was 19 years old. I was admitted to the Kidney Ward and I remember vividly how well I was looked after by the nursing staff and the doctors.

In 1998, after a routine Hernia operation by Dr Mathews I was advised by him that I could have a prostate problem. After a consultation with Dr Cameron-Strange he informed me that I had prostate cancer and would have to be operated on.

During my three weeks post surgery recovery, I was looked after extremely well by my doctors and

the nursing staff.

In 2001, the cancer reappeared, and I was advised to have radiation treatment. After six weeks of radiation I am now cancer free.

In 2004, I started having a problem again with my kidneys and I had to go on dialysis three days a week for five hours a day.

On the night of the 3rd of September 2008 I received the news that Prince of Wales Hospital had a kidney for me. At 4am on the 4th of September I had a successful kidney transplant operation. The kidney is still going well and is now eleven years old.

I guess you can see now why I have an affair to remember with Prince of Wales Hospital.

So once again could I implore you to remember this great Hospital Prince of Wales in Randwick with a gift in your Will.

**BARRY MATHERS**

*GIFT IN WILL FOUNDATION SUPPORTER*



## SUPPORTER STORY: ANTONY ERIKSEN

“In 2017, I became a regular giver donating monthly and made a provision in my Will...”

After I was diagnosed with oesophageal cancer in 2013, I was referred to Prince of Wales Hospital Oncology Department for treatment which resulted in a good outcome. For the past six years, I have seen firsthand the work of the Hospital's oncology doctors, nurses and ancillary staff at the Hospital.

During this time I have also learned about the rehabilitation and support services and have had extensive exposure to these services and support of the hospital staff which are paramount to recovery. I have also learnt about the support that the Prince of Wales Hospital Foundation provides by way of raising funds for research and facilities for the hospital together with support facilities for staff and patients.

In 2017, I became a regular giver donating monthly and made a provision in my Will for a bequest to the Foundation.

Through attending a number of fundraising events at the Hospital I have been able to see firsthand the work being undertaken in the laboratory facilities and other areas of the Hospital and understand why this work is so important. These projects ensure that advances are made in the treatment of a number of conditions and diseases with the support of the Foundation.

I am pleased to be able to offer support to the Foundation through regular donations over the past few years, seen the benefits of my donations, and look forward to continuing this in the hope that the Foundation will be better placed to provide funding into the future particularly in the field of research especially in the oncology field.

**ANTONY ERIKSEN**

*GIFT IN WILL FOUNDATION SUPPORTER*





## THANK YOU

**“On behalf of the staff at the Prince of Wales Hospital Foundation and the staff and patients of Prince of Wales Hospital I would like to sincerely thank you for your support. It is through the generosity and compassion that is shown from our wonderful supporters such as yourself that the Foundation can assist the Hospital in ensuring the best care possible for its patients through innovation and excellence.”**

**GRANT KENNEDY, PLANNED GIVING AND  
IN-MEMORY MANAGER**



## GIFTS IN WILLS WORDING

It is recommended that you obtain legal advice when making a Will and/or using a sample gift clause in your Will. You may find it helpful to take the following Will wording with you when you seek legal advice.

"I give to the Prince of Wales Hospital Foundation (ABN 21 109 372 545) **my whole estate for <insert either "general purposes" or insert a specific purpose>** and the receipt of its authorised officer for the time being is a sufficient discharge to my executors for the gift. If this gift cannot take effect – the funds are to be directed to the Prince of Wales Hospital Foundation and directed to activities that best match my known interests at the discretion of the Chief Executive Officer in consultation with the General Manager or similar position at Prince of Wales Hospital. I declare that a receipt issued by the Chief Executive Officer of the Prince of Wales Hospital Foundation shall be a sufficient discharge to my Trustees."

.....

"I give to the Prince of Wales Hospital Foundation (ABN 21 109 372 545) **my residuary estate or <insert number> % of my residuary estate for <insert either "general purposes" or insert a specific purpose>** and the receipt of its authorised officer for the time being is a sufficient discharge to my executors for the gift. If this gift cannot take effect – the funds are to be directed to the Prince of Wales Hospital Foundation and directed to activities that best match my known interests at the discretion of the Chief Executive Officer in consultation with the General Manager or similar position at Prince of Wales Hospital. I declare that a receipt issued by the Chief Executive Officer of the Prince of Wales Hospital Foundation shall be a sufficient discharge to my Trustees."

"I give to the Prince of Wales Hospital Foundation (ABN 21 109 372 545) **the sum of \$ <insert number> for <insert either "general purposes" or insert a specific purpose>** and the receipt of its authorised officer for the time being is a sufficient discharge to my executors for the gift. If this gift cannot take effect – the funds are to be directed to the Prince of Wales Hospital Foundation and directed to activities that best match my known interests at the discretion of the Chief Executive Officer in consultation with the General Manager or similar position at Prince of Wales Hospital. I declare that a receipt issued by the Chief Executive Officer of the Prince of Wales Hospital Foundation shall be a sufficient discharge to my Trustees."

.....

"I give to the Prince of Wales Hospital Foundation (ABN 21 109 372 545) **<insert address> my property for <insert either "general purposes" or insert a specific purpose>** and the receipt of its authorised officer for the time being is a sufficient discharge to my executors for the gift. If this gift cannot take effect – the funds are to be directed to the Prince of Wales Hospital Foundation and directed to activities that best match my known interests at the discretion of the Chief Executive Officer in consultation with the General Manager or similar position at Prince of Wales Hospital. I declare that a receipt issued by the Chief Executive Officer of the Prince of Wales Hospital Foundation shall be a sufficient discharge to my Trustees."

.....

"I give to the Prince of Wales Hospital Foundation (ABN 21 109 372 545) **my <insert precise detail of a specific gift> for <insert either "general purposes" or insert a specific purpose>** and the receipt of its authorised officer for the time being is a sufficient discharge to my executors for the gift. If this gift cannot take effect – the funds are to be directed to the Prince of Wales Hospital Foundation and directed to activities that best match my known interests at the discretion of the Chief Executive Officer in consultation with the General Manager or similar position at Prince of Wales Hospital. I declare that a receipt issued by the Chief Executive Officer of the Prince of Wales Hospital Foundation shall be a sufficient discharge to my Trustees."

.....

## PLANNED GIVING

- I have already left a gift in my Will to the Prince of Wales Hospital Foundation
- I intend to leave a gift in my Will to the Prince of Wales Hospital Foundation
- I am considering leaving a gift in my Will to the Prince of Wales Hospital Foundation
- I would like to receive information on leaving a gift in my Will to the Prince of Wales Hospital Foundation
- I have already left a gift in my Will to the Prince of Wales Hospital Foundation, but I wish to remain anonymous
- I would like the contact details for Nightingale Solicitors in my area

Nightingale Solicitors are a group of Solicitors that have agreed to write a simple Will or a codicil to an existing Will free of charge for benefactors who have decided to include a gift in their Will to the Prince of Wales Hospital Foundation.



### Your details

Title: \_\_\_\_\_ First Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Address: \_\_\_\_\_

Suburb: \_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Email: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

### Please return the completed form to:

Grant Kennedy, Planned Giving Manager  
PO Box 908 Randwick NSW 2031



**“I have seen the benefits of my donations, and look forward to continuing [my support] in the hope that the Foundation will be better placed to provide funding into the future particularly in the field of research, especially in the oncology field.”**

**ANTONY ERIKSEN**

**GIFT IN WILL FOUNDATION SUPPORTER**

# GLOSSARY OF TERMS

## **Administration Of An Estate**

– Term used for the work of the executor or administrator in carrying out the terms of a Will.

**Administrator** – A court appointed person or body put in charge of the estate of a person who died without a Will.

**Beneficiary** – A person or organisation benefiting under a Will.

**Bequest** – A gift of an identifiable asset (not money) to person/organisation in Will. However, the terms bequest (not money) and legacy (money) are often used interchangeably in general usage. Also known as a Gift in Will.

**Codicil** – A properly executed change or addition to an existing Will.

**Death Certificate** – A certificate stating details of the deceased that have been gathered from the family, which is issued by the Births, Deaths and Marriages section of the State or Territory Government. A certified copy is required for the purpose of substantiating various claims by the family of the deceased, such as matters in settling the deceased's estate, insurance and other death benefits.

**Death Notice** – This is a notice in the classified section of a newspaper, or on the internet, publicising the death of a person. A Death Notice is different from a

Funeral Notice (see Funeral Notice) and Obituary (see Obituary).

**Disbursements** – Disbursements are costs that are out of the control of the funeral director. These usually include newspaper notices, church and clergy fees, and cemetery and crematorium costs.

**Estate** – The totality of the property which the deceased owned or had some interest in at the time of death.

**Executor** – The executor of a Will is responsible for carrying out the wishes of a person after they die. The role of the executor is to manage the estate within the terms of the Will and protect the assets of the estate. The executor of an estate must comply with various laws and rules that govern the administration of deceased estates.

**Funeral Notice** – This is a notice in the classified section of a newspaper, or on the internet, publicising the death of a person and giving the details of the funeral or memorial service that the family wish to have published. A Funeral Notice is different from a Death Notice (see Death Notice) and an Obituary (see Obituary).

**Gift in Will** – A gift in Will refers to all types of gifts. A gift of real property (land, buildings), a gift of personal property (money, shares, life insurance, books, furniture)

**Intestate** – Dying without leaving a Will, or leaving an invalid Will, so that the property of the estate passes by the laws of succession rather than by the direction of the deceased.

**Legacy** – A gift of money to a person/organisation in Will. Also known as a Gift in Will.

**Life Interest** – A lifetime gift, such as giving someone the right to live in a property until that person's death. On the death of the person given the life interest, the asset or capital is distributed according to the Will.

**Obituary** – An obituary is a news article that reports the recent death of a person, typically along with an account of the person's life and sometimes information about the upcoming funeral service. In large cities and larger newspapers, obituaries are written only for people considered significant. In local newspapers, an obituary may be published for any local resident upon death.

**Pecuniary Legacy** – Fixed sum of money expressed as a gift in a Will.

**Power Of Attorney** – Powers of Attorney allow a person to give someone else the legal authority to look after their affairs on their behalf, whilst they are still alive. An Enduring Power of Attorney is a legal document where a person of their choice can be appointed to manage their assets and financial affairs if they are unable to do so due to illness, an accident or in their absence.

**Probate** – Probate is essentially official recognition that a Will is legally valid and gives permission to proceed with administering the estate.

**Residuary Legacy** – Remainder of your (money) estate left as a legacy after bequests and specific legacies have been distributed and all debts cleared. Also known as a Gift in Will.

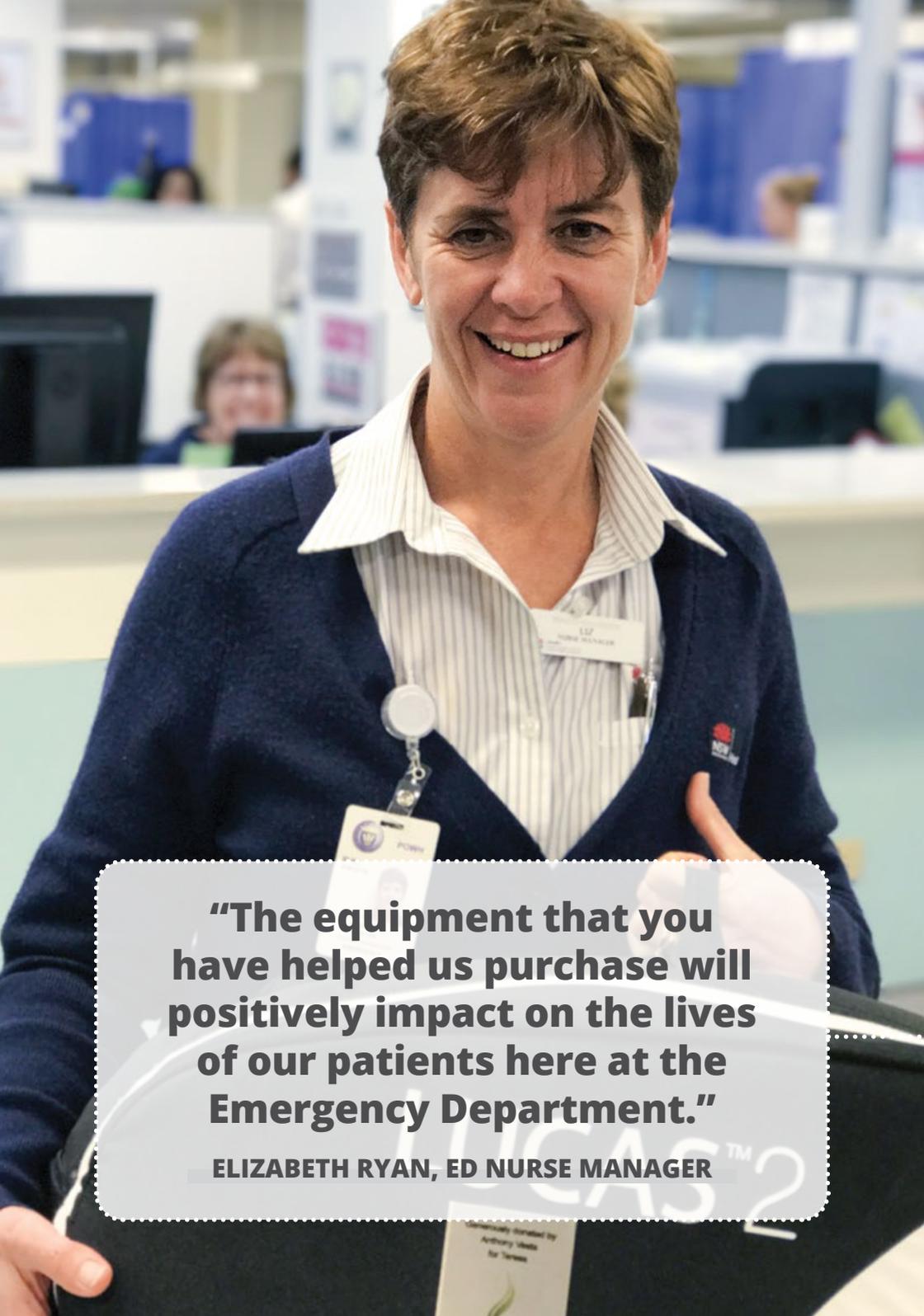
**Residuary Of Estate** – Possessions, property and money remaining after all debts are settled and all gifts are distributed in accordance with the Will. Also known as a Gift in Will.

**Testate** – Dying with a valid Will in place.

**Testator (M) /Testatrix (F)** – Person who makes a Will.

**Will** – A legal document expressing the intentions of a person for the distribution of their assets after death.

**If you have any questions or require further information please contact 02 9382 4263 or [hello@powhf.org.au](mailto:hello@powhf.org.au)**



**“The equipment that you have helped us purchase will positively impact on the lives of our patients here at the Emergency Department.”**

**ELIZABETH RYAN, ED NURSE MANAGER**

# YOUR PERSONAL INFORMATION

This is a record of your personal information and should be kept somewhere safe. It is a good idea to inform family members or a friend where this document is kept.

## Your information

Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Address: \_\_\_\_\_

Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

## Emergency and Next of Kin contacts

#1 – Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email: \_\_\_\_\_ @ \_\_\_\_\_

#2 – Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email: \_\_\_\_\_ @ \_\_\_\_\_

## Family Information

### *Spouse/Partner*

Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Date of Marriage: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

### *Name(s) of Children*

#1 – Name: \_\_\_\_\_ DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

#2 – Name: \_\_\_\_\_ DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

#3 – Name: \_\_\_\_\_ DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

## Accountant

Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email: \_\_\_\_\_ @ \_\_\_\_\_

Documents held: \_\_\_\_\_

## Australian Taxation Office

Tax File Number: \_\_\_\_\_

## Australian Electoral Commission

Phone: 132 326

## Australia Post

13 POST (13 7678) – Free 12-month mail redirection for special circumstances

## Bank/Investments

### *Bank Accounts*

#1 – Bank: \_\_\_\_\_

Branch: \_\_\_\_\_ Phone: \_\_\_\_\_

BSB: \_\_\_\_\_ Account Number: \_\_\_\_\_

Online Banking – Login: \_\_\_\_\_ Password: \_\_\_\_\_

#2 – Bank: \_\_\_\_\_

Branch: \_\_\_\_\_ Phone: \_\_\_\_\_

BSB: \_\_\_\_\_ Account Number: \_\_\_\_\_

Online Banking – Login: \_\_\_\_\_ Password: \_\_\_\_\_

#3 – Bank: \_\_\_\_\_

Branch: \_\_\_\_\_ Phone: \_\_\_\_\_

BSB: \_\_\_\_\_ Account Number: \_\_\_\_\_

Online Banking – Login: \_\_\_\_\_ Password: \_\_\_\_\_

*Cards: Visa/Mastercard/Debit*

#1 – Card Number: \_\_\_\_\_

Expiry Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ CW Number: \_\_\_\_\_

Online Banking – Login: \_\_\_\_\_ Password: \_\_\_\_\_

#2 – Card Number: \_\_\_\_\_

Expiry Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ CW Number: \_\_\_\_\_

Online Banking – Login: \_\_\_\_\_ Password: \_\_\_\_\_

#3 – Card Number: \_\_\_\_\_

Expiry Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ CW Number: \_\_\_\_\_

Online Banking – Login: \_\_\_\_\_ Password: \_\_\_\_\_

*Investments (Shares etc)*

#1 – Company: \_\_\_\_\_

Investment Details: \_\_\_\_\_

#2 – Company: \_\_\_\_\_

Investment Details: \_\_\_\_\_

#3 – Company: \_\_\_\_\_

Investment Details: \_\_\_\_\_

**Centrelink**

Centrelink Number: \_\_\_\_\_

**Clubs**

#1 – Club: \_\_\_\_\_

Membership Number: \_\_\_\_\_ Phone: \_\_\_\_\_

#2 – Club: \_\_\_\_\_

Membership Number: \_\_\_\_\_ Phone: \_\_\_\_\_

**Employer/Business Partner**

*Employer*

Company: \_\_\_\_\_

Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

*Business Partners*

Company: \_\_\_\_\_ ABN: \_\_\_\_\_

#1 – Name: \_\_\_\_\_ Phone: \_\_\_\_\_

#2 – Name: \_\_\_\_\_ Phone: \_\_\_\_\_

**Funeral Arrangements**

*Pre-paid/Pre-arranged information*

Company: \_\_\_\_\_

Funeral Director's Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Preferred Celebrant/Religious Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Cemetery/Crematorium: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

**Home**

Mortgage Details: \_\_\_\_\_

Property Titles Located at: \_\_\_\_\_

Phone: \_\_\_\_\_

Property/Strata Manager: \_\_\_\_\_

Phone: \_\_\_\_\_

Landlord/Real Estate: \_\_\_\_\_

Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

**Home Care Services** (e.g. Meals on Wheels, domestic help, lawns, garden)

#1 – Service: \_\_\_\_\_

Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

#2 – Service: \_\_\_\_\_

Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

#3 – Service: \_\_\_\_\_

Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

## **Insurance**

### *Home Insurance*

Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Phone: \_\_\_\_\_

### *Car Insurance*

#1 – Company: \_\_\_\_\_ Rego: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Phone: \_\_\_\_\_

#2 – Company: \_\_\_\_\_ Rego: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Phone: \_\_\_\_\_

### *Life Insurance*

#1 – Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Phone: \_\_\_\_\_

#2 – Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Phone: \_\_\_\_\_

### *Boat Insurance*

#1 – Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Phone: \_\_\_\_\_

### *Pet Insurance*

#1 – Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Phone: \_\_\_\_\_

## **Internet**

Internet Provider: \_\_\_\_\_

Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

Wi-Fi Name: \_\_\_\_\_ Password: \_\_\_\_\_

## Licences

### *Drivers Licence*

Licence Number: \_\_\_\_\_ Expiry: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

### *Boat Licence*

Licence Number: \_\_\_\_\_ Expiry: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

## Local Council

Name: \_\_\_\_\_

Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

## Medical/Health Information (e.g. Doctor, Dentist, Optometrist)

Medicare Number: \_\_\_\_\_ Expiry: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Private Health Fund: \_\_\_\_\_

Membership Number: \_\_\_\_\_ Phone: \_\_\_\_\_

### *Doctor*

#1 – Doctor's Name: \_\_\_\_\_

Practice Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

#2 – Doctor's Name: \_\_\_\_\_

Practice Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

#3 – Doctor's Name: \_\_\_\_\_

Practice Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

### *Dentist*

Dentist's Name: \_\_\_\_\_

Practice Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

### *Optometrist*

Optometrist's Name: \_\_\_\_\_

Practice Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_

*Physiotherapist*

Physiotherapist's Name: \_\_\_\_\_  
Practice Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_

*Specialist*

#1 – Doctor's Name: \_\_\_\_\_  
Practice Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_

#2 – Doctor's Name: \_\_\_\_\_  
Practice Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_

*Hospital*

Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_

**Motor Vehicle**

*Service NSW (licence, vehicle registration) 13 77 88*

#1 – Registration Number: \_\_\_\_\_  
Make: \_\_\_\_\_ Model: \_\_\_\_\_  
E-Toll Provider: \_\_\_\_\_ Tag Number: \_\_\_\_\_  
Toll Account Number: \_\_\_\_\_  
Roadside Assistance Provider: \_\_\_\_\_  
Roadside Assistance Card Number: \_\_\_\_\_  
Roadside Assistance Membership Number: \_\_\_\_\_

See **Insurance** section for Insurance details.

#2 – Registration Number: \_\_\_\_\_  
Make: \_\_\_\_\_ Model: \_\_\_\_\_

E-Toll Provider: \_\_\_\_\_ Tag Number: \_\_\_\_\_

Toll Account Number: \_\_\_\_\_

Roadside Assistance Provider: \_\_\_\_\_

Roadside Assistance Card Number: \_\_\_\_\_

Roadside Assistance Membership Number: \_\_\_\_\_

See *Insurance* section for *Insurance* details.

**Online Details** (*Places you log-in to on the internet*)

*Email*

#1 – Email Provider URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

#2 – Email Provider URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

#3 – Email Provider URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

*Facebook*

Login: \_\_\_\_\_

Password: \_\_\_\_\_

*Instagram*

Login: \_\_\_\_\_

Password: \_\_\_\_\_

*Pinterest*

Login: \_\_\_\_\_

Password: \_\_\_\_\_

*LinkedIn*

Login: \_\_\_\_\_

Password: \_\_\_\_\_

*Twitter*

Login: \_\_\_\_\_

Password: \_\_\_\_\_

*Cloud*

Cloud Storage Provider URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

*Reward Program*

#1 – URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

#2 – URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

#3 – URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

*Online Retail*

#1 – URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

#2 – URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

#3 – URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

*Other*

#1 – URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

#2 – URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

#3 – URL: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

*Subscriptions*

#1 – Magazine/Newspaper: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

#2 – Magazine/Newspaper: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

#3 – Magazine/Newspaper: \_\_\_\_\_

Login: \_\_\_\_\_

Password: \_\_\_\_\_

**Organ Donor**

Contact: \_\_\_\_\_

Phone: \_\_\_\_\_

**Solicitor/Lawyer/Trustee – Will**

*Solicitor*

Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Documents held: \_\_\_\_\_

*Lawyer*

Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Documents held: \_\_\_\_\_

*Trustee*

Name: \_\_\_\_\_ Surname: \_\_\_\_\_

Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Documents held: \_\_\_\_\_

**Will**

Located at: \_\_\_\_\_ Date of Will: \_\_\_\_/\_\_\_\_/\_\_\_\_

Executor's Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

**Superannuation**

#1 – Name of Fund: \_\_\_\_\_

Membership Number: \_\_\_\_\_ Plan Number: \_\_\_\_\_

ID Number: \_\_\_\_\_ Phone: \_\_\_\_\_

#2 – Name of Fund: \_\_\_\_\_

Membership Number: \_\_\_\_\_ Plan Number: \_\_\_\_\_

ID Number: \_\_\_\_\_ Phone: \_\_\_\_\_

#3 – Name of Fund: \_\_\_\_\_

Membership Number: \_\_\_\_\_ Plan Number: \_\_\_\_\_

ID Number: \_\_\_\_\_ Phone: \_\_\_\_\_

## Technology

### Computer

#1 – Computer: \_\_\_\_\_

User: \_\_\_\_\_ Password: \_\_\_\_\_

#2 – Computer: \_\_\_\_\_

User: \_\_\_\_\_ Password: \_\_\_\_\_

### iPhone

#1 – iPhone: \_\_\_\_\_

Apple ID/Cloud Login: \_\_\_\_\_

Password: \_\_\_\_\_ Phone pin: \_\_\_\_\_

#2 – iPhone: \_\_\_\_\_

Apple ID/Cloud Login: \_\_\_\_\_

Password: \_\_\_\_\_ Phone pin: \_\_\_\_\_

### Android Phone

#1 – Android Phone: \_\_\_\_\_

Google/HTC/Samsung Login: \_\_\_\_\_

Password: \_\_\_\_\_ Phone pin: \_\_\_\_\_

#2 – Android Phone: \_\_\_\_\_

Google/HTC/Samsung Login: \_\_\_\_\_

Password: \_\_\_\_\_ Phone pin: \_\_\_\_\_

### iPad

#1 – iPad: \_\_\_\_\_

Apple ID/Cloud Login: \_\_\_\_\_

Password: \_\_\_\_\_ Tablet pin: \_\_\_\_\_

#2 – iPad: \_\_\_\_\_

Apple ID/Cloud Login: \_\_\_\_\_

Password: \_\_\_\_\_ Tablet pin: \_\_\_\_\_

*Android Tablet*

#1 – Android Tablet: \_\_\_\_\_

Google/HTC/Samsung Login: \_\_\_\_\_

Password: \_\_\_\_\_ Tablet pin: \_\_\_\_\_

#2 – Android Tablet: \_\_\_\_\_

Google/HTC/Samsung Login: \_\_\_\_\_

Password: \_\_\_\_\_ Tablet pin: \_\_\_\_\_

**TV – Cable/streaming** (*Foxtel, Netflix, Stan*)

#1 – Name: \_\_\_\_\_

Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

#2 – Name: \_\_\_\_\_

Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

#3 – Name: \_\_\_\_\_

Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

**Utilities** (*e.g. gas, electricity, water, phone, internet*)

*Water Supply Company*

Name: \_\_\_\_\_

Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

*Gas Supply Company*

Name: \_\_\_\_\_

Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

*Electricity Supply Company*

Name: \_\_\_\_\_

Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

*Telephone Company – Landline*

Name: \_\_\_\_\_

Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

*Telephone Company – Mobile*

Name: \_\_\_\_\_

Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

**Since 2004, the Foundation has endeavoured to raise vital funds and awareness for the continued development of health promotion, research, education, equipment, facilities and special projects at Prince of Wales Hospital.**





# BUCKET LIST

Things I most want to do!

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_

## 'DON'T' LIST

After I'm gone remember please don't...

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_

## 'DO' LIST

Things to do, places to go... my list for you.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_

## LETTERS TO LOVED ONES

I have written a letter to each of the following people, to be opened after my passing.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_

9. \_\_\_\_\_

10. \_\_\_\_\_

11. \_\_\_\_\_

12. \_\_\_\_\_

13. \_\_\_\_\_

14. \_\_\_\_\_

Location of letters: \_\_\_\_\_

# EMERGENCY SERVICES

.....

## Police – Call 000

Local Station: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

.....

## Fire Brigade – Call 000

Local Fire Station: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

.....

## Ambulance – Call 000

Local Despatch: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

.....

## SES (State Emergency Service) – Call 132 500

Local SES Unit: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

.....



Level 3, High Street East Building, Prince of Wales Hospital, Randwick NSW 2031  
(02) 9382 4263 | [www.powhf.org.au](http://www.powhf.org.au) | [hello@powhf.org.au](mailto:hello@powhf.org.au)

*Give the gift of a lifetime...*