



# FIA Conference 2023

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# Helping supporters to avoid the top ten pitfalls with Gifts in Wills

GIFTS IN WILLS

Christine Robinson – WWF–Australia

Maureen Koegel – Bequest Assist

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# Welcome.

Maureen Koegel



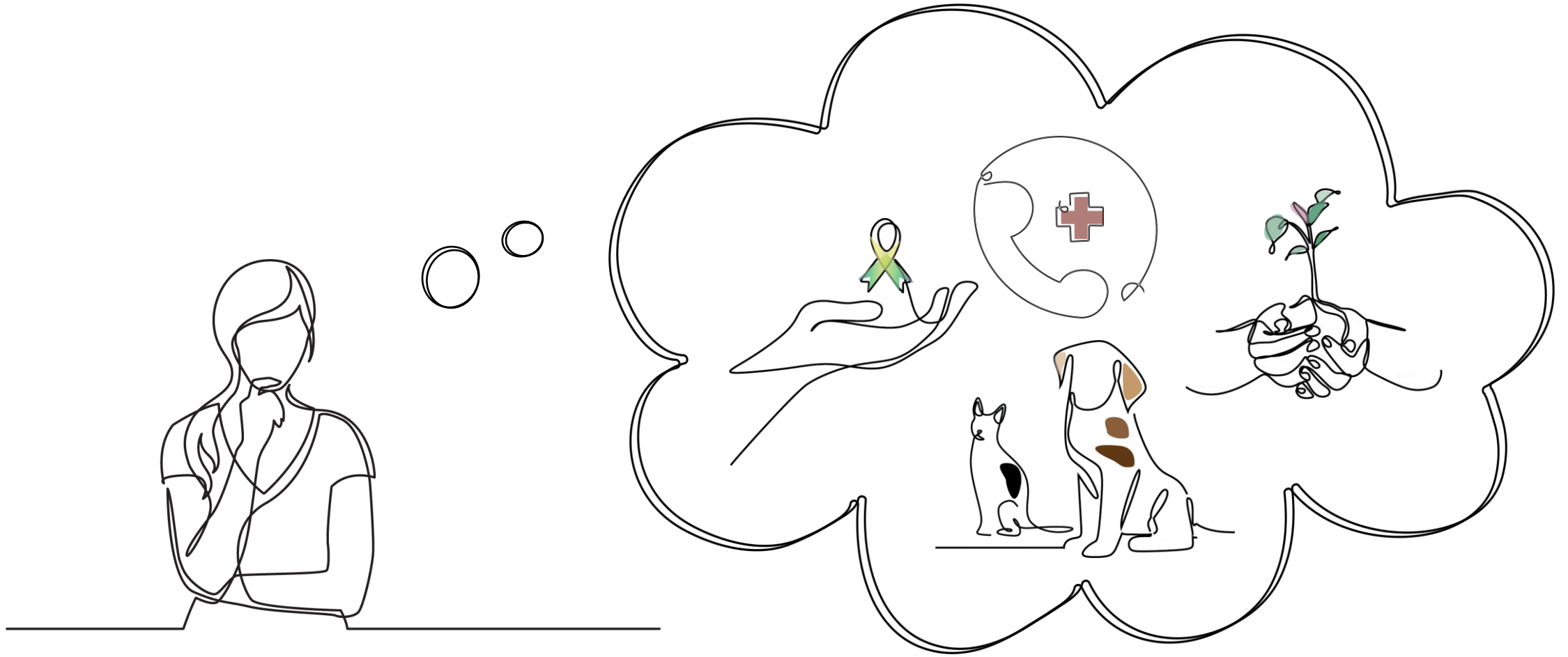
Christine Robinson



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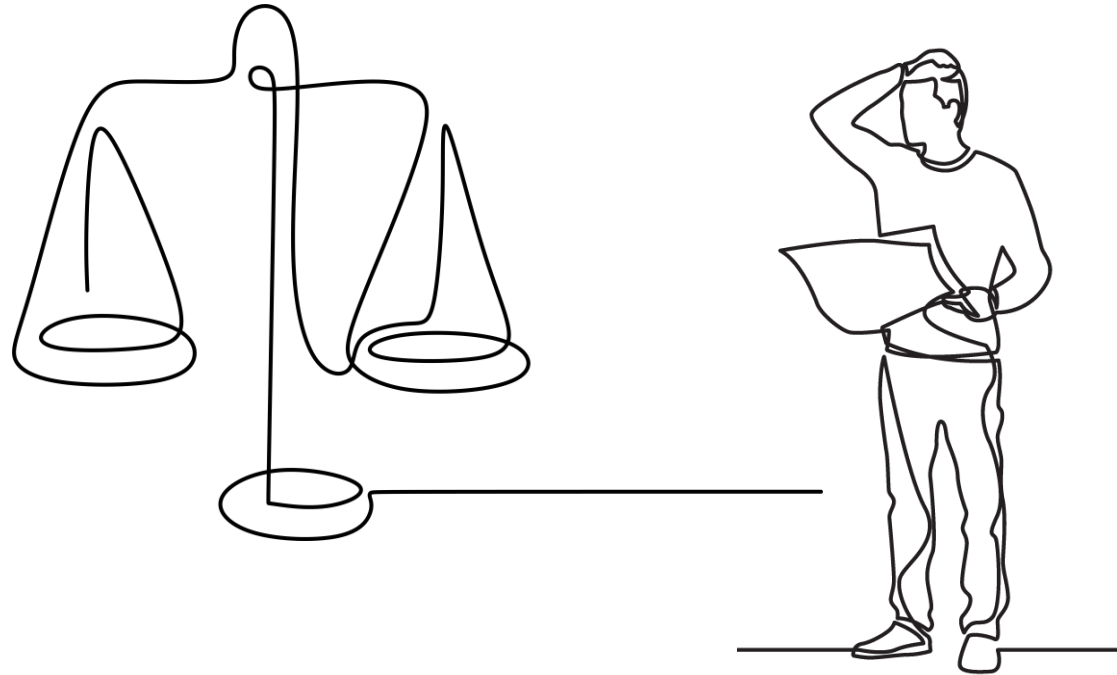
# I want to leave your charity a gift in my Will....



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# I want to leave your charity a gift in my Will....

## 1. Which solicitor should I go to?



# I want to leave your charity a gift in my Will....

1. Which solicitor should I go to?  
...can I write my will online...and for free!?!

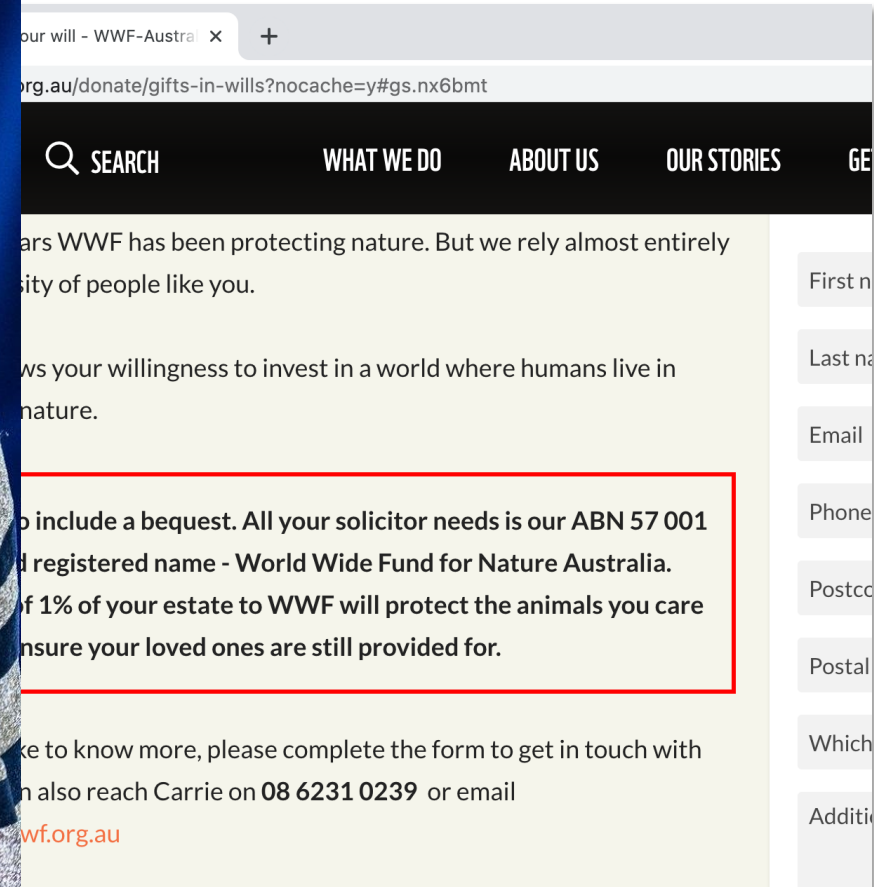




# I want to leave your charity a gift in my Will.

## 2. What do I write

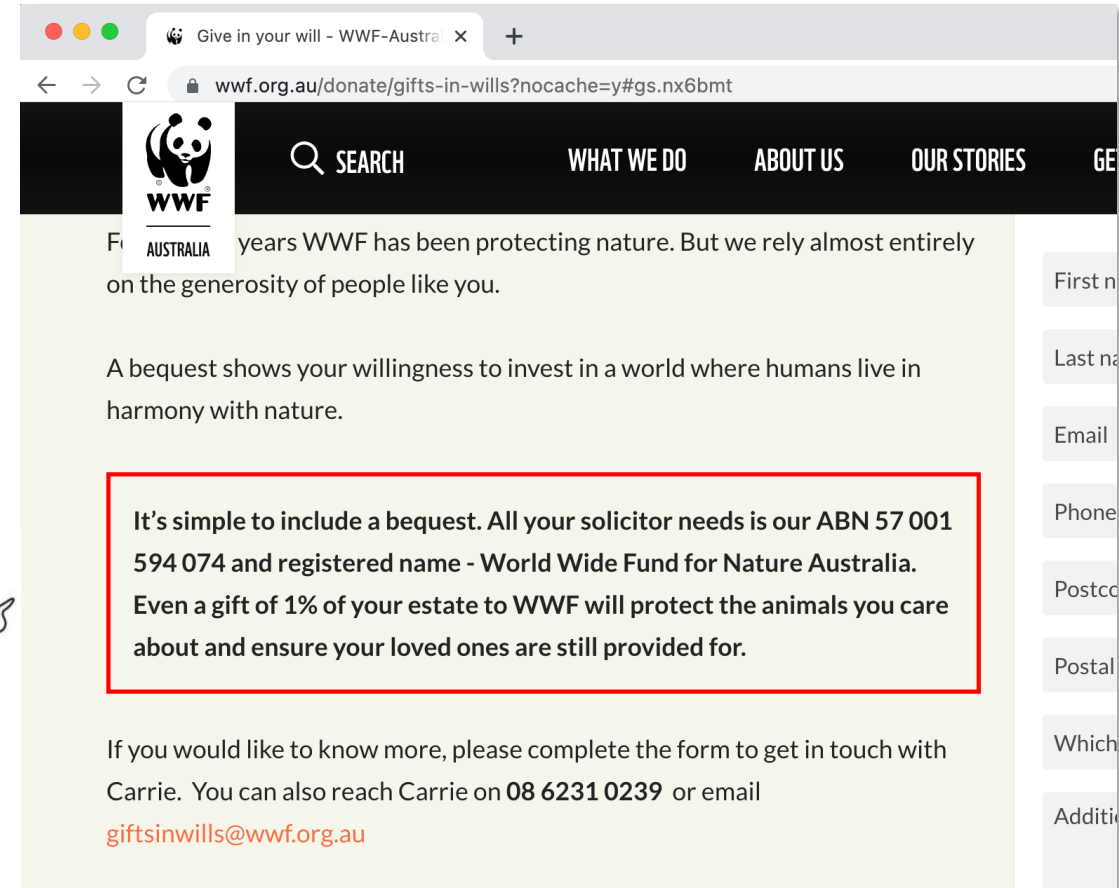
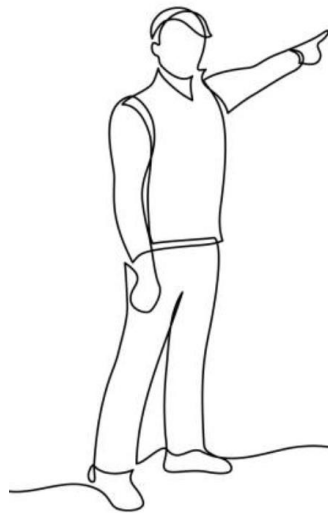
- Your charity's ABN
- Your charity's full name



# I want to leave your charity a gift in my Will....

## 2. What do I write in my Will?

- Your charity's ABN
- Your charity's full registered name

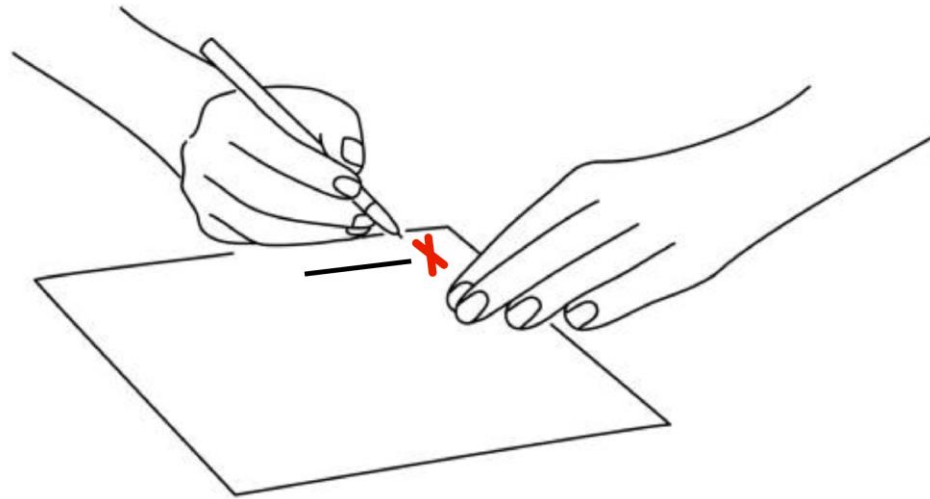




# I want to leave your charity a gift in my Will....

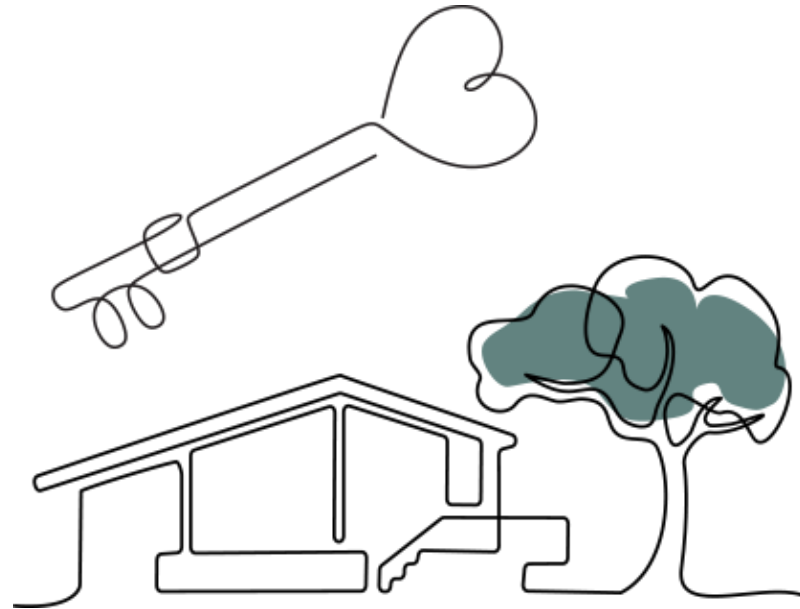
## 3. What should I do with my Will now?

- Sign it.
- Don't forget to sign it.
- **Absolutely sign it.**



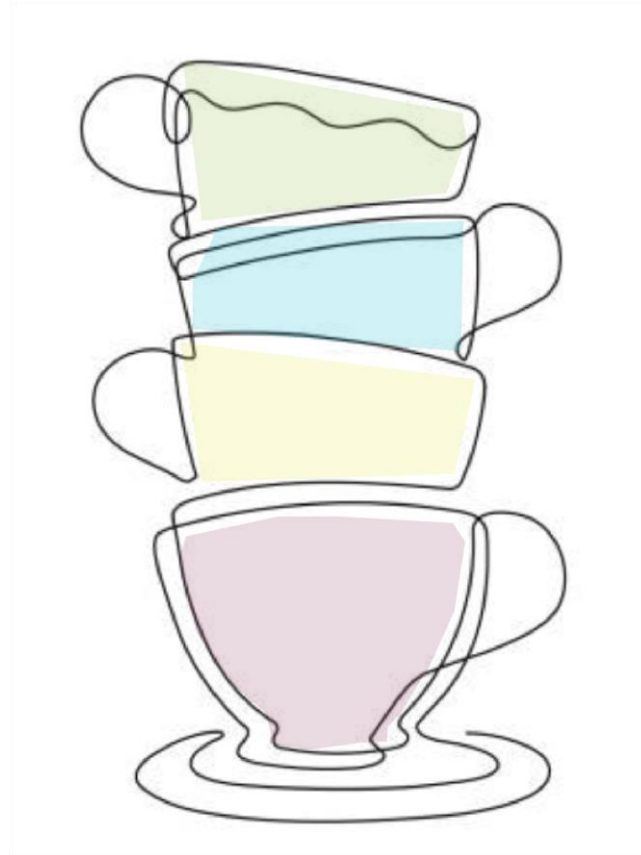
# I want to leave your charity a gift in my Will....

## 4. Can I leave a charity my house or my land?



I want to leave your charity a gift in my Will....

## 5. Can I leave a charity my teacups?



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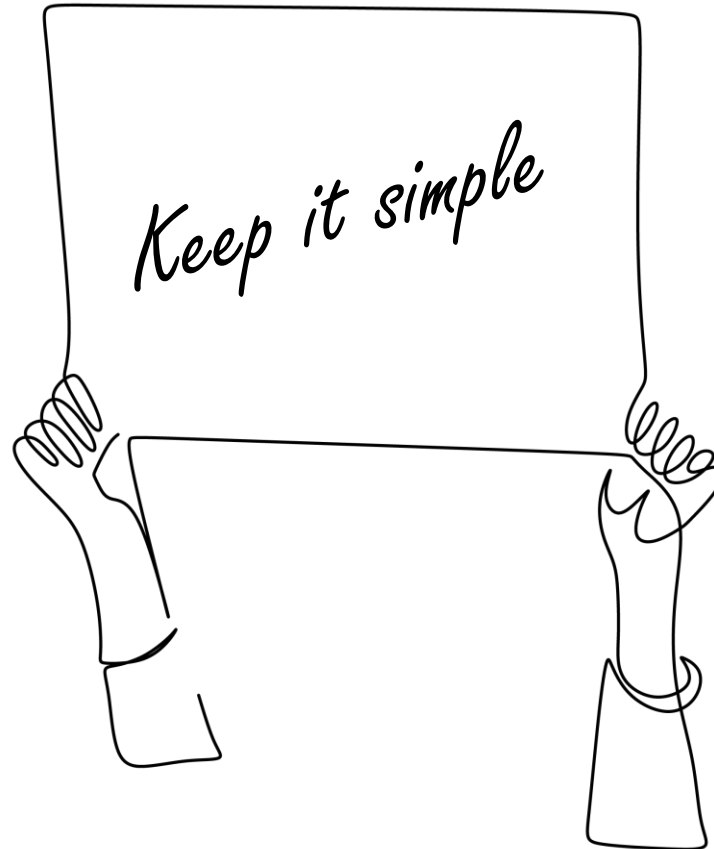


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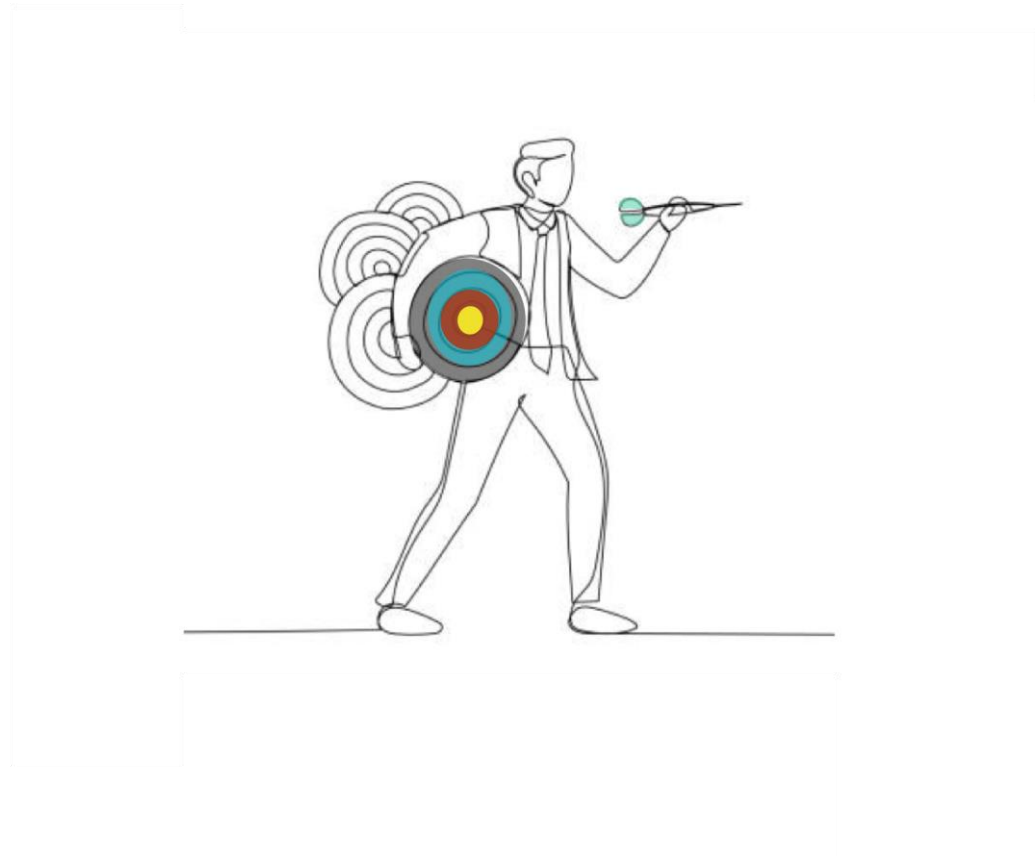
I want to leave your charity a gift in my Will....

## 6. How can I avoid estate taxes?



# I want to leave your charity a gift in my Will....

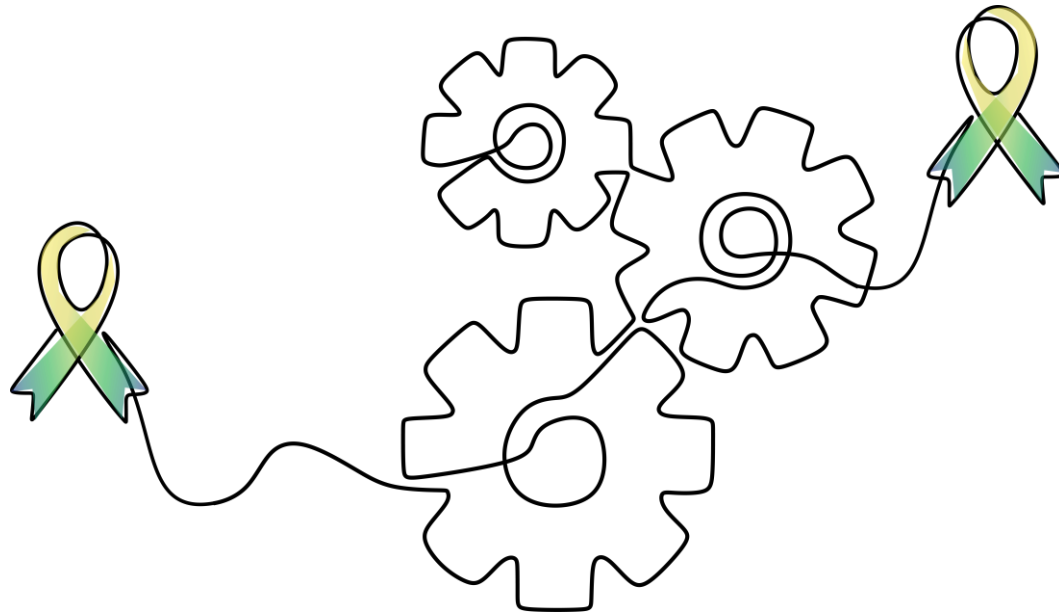
## 7. I only want my gift used for...



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I want to leave your charity a gift in my Will....

## 8. Will your charity act as my executor?





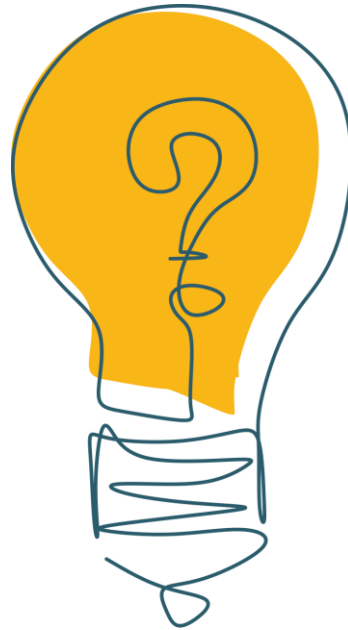
I want to leave your charity a gift in my Will....

9. My son hasn't spoken to me for 20 years,  
so I'm leaving him out of my Will.



I want to leave your charity a gift in my Will....

## 10. How is a legacy different to a gift in Will?



# Golden nuggets – Take these away!



The FIA Fundraising Code of Conduct should be your guide



Provide your charity's ABN and full registered name



The Will needs to be signed and witnessed



**Don't let the detail rule – remember the legacy**





# Thank you

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