



Bequest Program

Creating a Legacy and
Giving the Past a Future



NATIONAL
TRUST

Creating a Legacy

Leaving a gift or bequest in your Will to either the National Trust of Australia (Victoria), or the National Trust of Victoria Foundation, or both, is a powerful way to create a lasting legacy by providing ongoing support for the protection of Victoria's heritage and the places you care about.

About Us

THE NATIONAL TRUST OF AUSTRALIA (VICTORIA)

Since 1956, the National Trust of Australia (Victoria) has been actively working towards conserving and protecting our heritage for future generations to enjoy. The National Trust is an independent not-for-profit organisation, supported by its members and the community. It is the premier heritage and conservation organisation in our state, and the major operator of historic properties open to the public.

Our work is multi-faceted and continues to evolve:

- We manage 39 historic sites which attract over 400,000 visitors per annum.
- We are custodians of over 35,000 heritage objects
- We are the largest community based heritage organisation in Victoria that leads advocacy campaigns to protect heritage places from threats to their significance
- We deliver innovative education programs across primary and secondary levels to over 60,000 students per year.

Our mission is to inspire the community to appreciate, conserve and preserve its built, natural and cultural heritage.

The Trust's vision is for the Australian community to understand, value, and enjoy the built, natural and cultural heritage that creates our national identity.

THE NATIONAL TRUST OF VICTORIA FOUNDATION

The National Trust of Victoria Foundation has been established for the purpose of creating a significant, secure fund to allow the National Trust in Victoria to carry out its mission and vision of preserving and conserving Victoria's heritage well into the future.

The Foundation allows for the capital of the endowment fund to be preserved in perpetuity, with the income made available to support the long-term sustainability of our properties.

Most of the 39 properties and some 35,000 items entrusted to the National Trust in Victoria are not accompanied by funding for future preservation. Without the support of a Foundation to hold funds for this purpose, National Trust properties and collections could be at risk.



*Mooramong collection
by Jessica Hood*



Gulf Station by
Christopher Groenhout

What is a bequest?

A bequest is the gift of an asset or other right provided as part of a Will, intestacy or settlement. Bequests may be for a particular asset, amount or percentage of an estate.

A bequest in a Will can be left in a number of different ways:

- Pecuniary bequest - a fixed amount specified in a Will.
- Residuary bequest - the remaining value of an estate when all other bequests to family and friends have been made and liabilities have been paid.
- Reversionary bequest - allows a surviving partner to benefit from your estate during their life time and then for the balance of the estate to be paid to the National Trust or National Trust of Victoria Foundation on their death.

Why leave a bequest to The National Trust or the Foundation?

Bequests help us provide ongoing support to the cause of heritage preservation and extend the impact of your giving beyond your lifetime. Your gift creates a lasting legacy.

I joined the National Trust in 1968 and later made myself a life member thus making sure that I will be a member 'til the day I die.

I have ensured, by making a bequest to the National Trust of Victoria Foundation in my will, that I will be a supporter to the end of time.

Now that's a wonderful way to die happy and know that the vital work of the Trust will continue.

Anthony Walgrave Knight
OAM
National Trust Life Member

Types of Bequests

People wishing to include a gift or bequest in their Will to the National Trust or the Foundation can select one of (3) options:

1. A GIFT TO THE NATIONAL TRUST OF AUSTRALIA (VICTORIA)

Your gift will be placed with the National Trust of Australia (Victoria) to support the ongoing multifaceted work of the organisation including property, conservation and management, heritage advocacy, education and community engagement.

2. A GIFT TO THE NATIONAL TRUST OF VICTORIA FOUNDATION

Your gift can be placed with the Foundation in support of all properties or placed in an existing National Trust (named) property or purpose sub-fund.

These include:

- Gardens Sub-fund
- General Collections Sub-fund
- Fashion Collection Conservation Sub-fund
- Named Property Sub-fund (eg. Gulf Station, Como)

Your gift can be used to establish a new named Sub Fund with a specific area for future granting.

3. GIFT TO BOTH ENTITIES

Making it Happen

To help you get started, we outline the following options and suggested wording for your Will. The following is provided as a guide. We recommend you take advice from your solicitor in the preparation of your Will. If you have any queries we are happy for you or your solicitor to contact Philip Martins, Interim Chief Executive Officer and CFO: philip.martins@nattrust.com.au or (03) 9656 9800.

1. A GIFT IN THE FORM OF A BEQUEST TO THE NATIONAL TRUST OF AUSTRALIA (VICTORIA)

I give or bequeath to the National Trust of Australia (Victoria), ABN 61 004 356 192, 6 Parliament Place, East Melbourne, VIC 3002 (form of gift, e.g. sum of money, x% of my residuary estate, other) to apply the funds as the National Trust sees fit.

2. A GIFT TO THE NATIONAL TRUST OF VICTORIA FOUNDATION

I give and bequeath to the National Trust of Victoria Foundation, ABN 6286 2859 294, Trustee for the National Trust of Victoria Foundation for support of all National Trust of Australia (Victoria) properties, or an existing Foundation (named) sub-fund.

Your Legacy

"Generations to come will look back and thank the passionate people and organisations who stood for conserving our significant buildings and parklands by contributing to the National Trust of Australia (Victoria) and the Foundation.

If you join us in supporting our work you will be reaching out and touching the hearts and minds of the future."



Rippon Lea Estate



The Armytage Society

Upon making a bequest in your Will, you will join many others as a member of the Armytage Society, an honour reserved for those who advise the National Trust that they have made a bequest to the National Trust or National Trust of Victoria Foundation in their Will.

The Armytage Society is named for the Armytage family who resided at South Yarra's Como from 1864. It was through the foresight of the last surviving children of Charles and Caroline Armytage that the newly formed National Trust of Australia (Victoria) was able to make its first acquisition of a historic property of significance, Como, saving it from demolition.

Members of the Armytage Society are invited to unique programs developed each year by the National Trust. During these occasions Society members may be taken behind the scenes to learn about the Trust's restoration work, meet with historians, heritage architects and others instrumental to the preservation of our heritage. Or, they may be invited to special events at the properties. The Armytage Society is the bequeathing program of the National Trust and National Trust of Victoria Foundation.

Next steps

We recommend that you seek advice from a solicitor to ensure that the wording of your Will reflects your exact wishes. You may also wish to speak to an accountant with respect to taxation and financial matters.

If you choose to leave a bequest to The National Trust and/or the National Trust of Victoria Foundation, we ask that you or your solicitor provide us with notification so that we can discuss with you how your bequest can be targeted to ensure its long term viability and impact.

If you need legal advice, the National Trust is privileged to have a number of lawyers that support us who are all experts and experienced in estate planning. We would be happy for you or your solicitor to contact Philip Martins, Interim Chief Executive Officer and CFO: philip.martins@nattrust.com.au or (03) 9656 9800.

Alternatively, please complete the form attached and mail to us at *Creating a Legacy*, The National Trust, 4 Parliament Place, East Melbourne, VIC 3002. We will then contact you.

Details

Name _____

Address _____

Telephone _____ Email _____

Bequest

☐ I wish to Create a Legacy and leave a bequest in my Will to the National Trust of Australia (Victoria) and/or The National Trust of Victoria Foundation

Please contact me via (check all relevant) ☐ Phone ☐ Email

☐ No thanks. I do not wish to leave a bequest in my Will

Donation

☐ I wish to make a donation at this time to:

☐ National Trust of Australia (Victoria)

☐ National Trust of Victoria Foundation

☐ for the purpose of all properties OR

Sub-fund

☐ Geelong properties

☐ Fashion Collection

☐ Education programs

☐ Gardens

☐ Gulf Station

☐ Portable Iron Houses

☐ NE Victorian properties

☐ Labassa

☐ Como House

☐ Rippon Lea Estate

☐ La Trobe's Cottage

☐ Mooramong

☐ McCrae Cottage

☐ Heritage skills training

☐ Other property _____

My Donation \$ _____

Payment Details

Credit card

Please charge my credit card ☐ Visa ☐ MasterCard ☐ Amex

Credit Card Number

Cardholder's name _____ Expiry Date: /

Cardholder's signature _____ Date: / /

Bank transfer

To make a donation by bank transfer please complete this donation form and return by post (address below) and make your transfer via the account(s) below:

Name National Trust of Australia (VIC)
BSB 033 000 **Account Number** 680238

Name National Trust of Victoria Foundation
BSB 033 002 **Account Number** 430304

Cheque

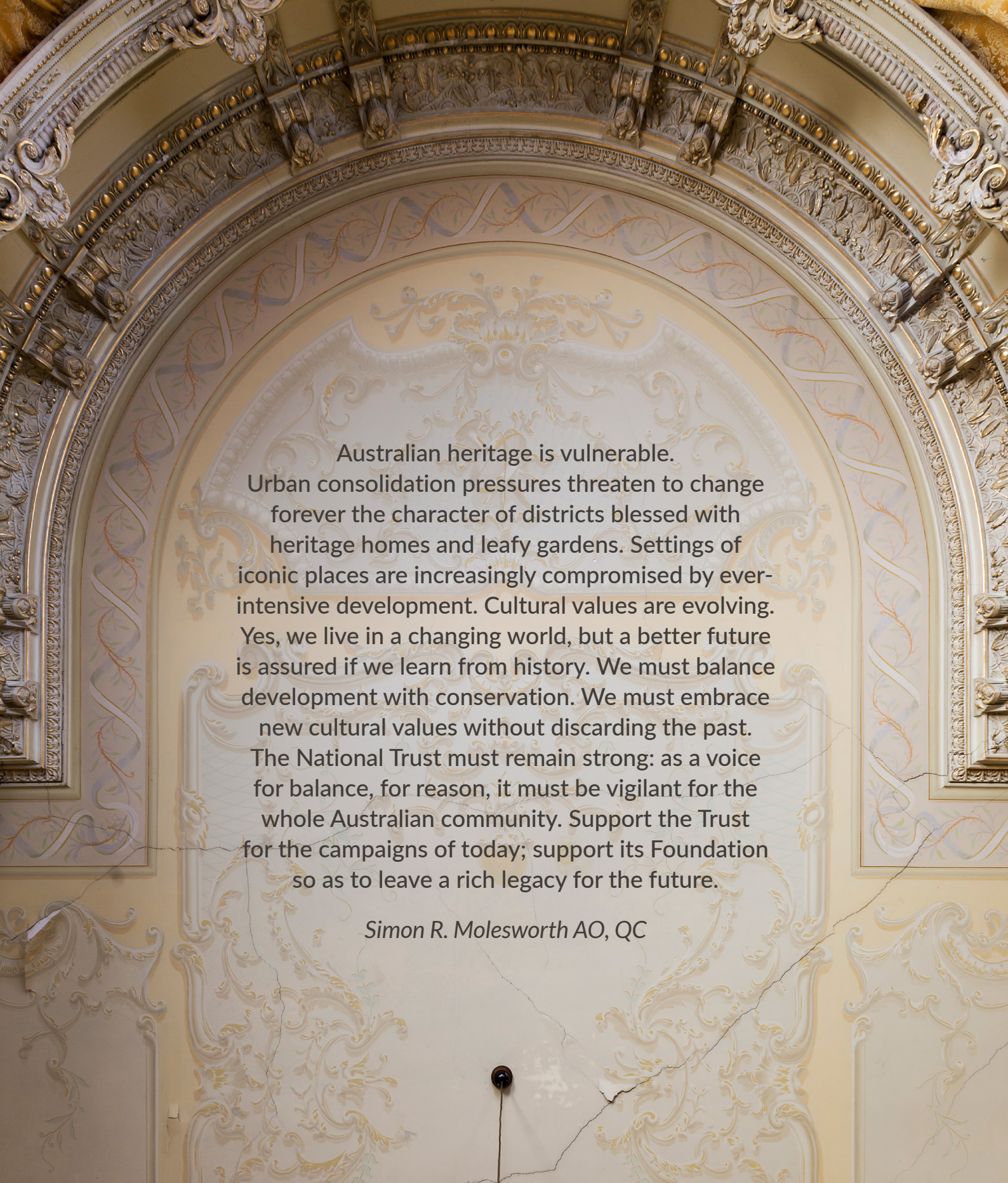
Cheques to be made payable to the National Trust of Australia (Victoria) or the National Trust of Victoria Foundation

When you have completed this donation form, please post to Creating a Legacy, The National Trust of Australia (Victoria), 6 Parliament Place, East Melbourne, 3002. All donations above \$2.00 are tax deductible and will be receipted by return post.

Alternatively you may donate online at nationaltrust.org.au/about-us-vic/donate-vic/

Thank you for your support!





Australian heritage is vulnerable. Urban consolidation pressures threaten to change forever the character of districts blessed with heritage homes and leafy gardens. Settings of iconic places are increasingly compromised by ever-intensive development. Cultural values are evolving. Yes, we live in a changing world, but a better future is assured if we learn from history. We must balance development with conservation. We must embrace new cultural values without discarding the past. The National Trust must remain strong: as a voice for balance, for reason, it must be vigilant for the whole Australian community. Support the Trust for the campaigns of today; support its Foundation so as to leave a rich legacy for the future.

Simon R. Molesworth AO, QC