



Gift in Wills Guide

Information for Solicitors & Estate Planners

If your client has decided to leave a bequest to the Northern NSW Helicopter Rescue Service Limited you can be assured we will honour their wishes, use their gift carefully and cost-effectively, and treat it with the respect and sensitivity it deserves. As part of your discussions with your client please:

- Identify if your client would like the gift to be specific to a region, with funds to be allocated to a particular base Newcastle base (Belmont), Tamworth base, Lismore base or for general use across our entire operations.
- Ensure the correct wording is used and include our full company name: Northern NSW Helicopter Rescue Service Limited and ABN 40 002 862 026. We have included some suggested wording.
- Encourage your client to notify us of their inclusion of the Westpac Rescue Helicopter Service in their Will so we can keep in contact with updates from the Service.
- Pass on our sincere thanks for choosing to support the Service in their Will. A bequest, no matter what size, is a truly significant gift and will make a direct impact to help us to help others when they need us most.

ADMINISTRATION OF AN ESTATE

When it is time to administer an estate in which a gift has been left to the Westpac Rescue Helicopter Service, we would appreciate your assistance by:

- Notifying us of the gift in the will. We ask that you also provide us with a copy of the will or probate for the estate as this allows us to match the testator to our donor records and also identifies any restrictions attached to the use of the bequest.
- Telling us about your client. We like to have an opportunity to thank the remaining family and friends in honour of the testator's memory.

These actions allow us to respect your client's final wishes, honour their memory and maximise the impact of their donation.

SUPPORTING CHARITABLE BEQUESTS

You can also support us in the following ways:

- Request copies of our bequest information pack to have information on hand for your future clients regarding the opportunity to leave a charitable donation to the Service in their will.
- Join our Wills Week promotion where law firms and solicitors across Northern NSW donate their time, energy and booking fee to help people to secure a professionally drafted Will while supporting a local charity at the same time.

CONTACT US

For any enquiries regarding bequests, the administration of an estate or participation in Wills Week please contact us on 1800 155 155.

SUGGESTED WORDING

The following words are recommended as a guide only to assist in preparing a Will with a bequest to the Westpac Rescue Helicopter Service.

Your client may specify the region they wish to support by nominating a particular base (Newcastle, Tamworth or Lismore). It is not necessary to nominate a base, however if they choose to, we can ensure their wishes are followed assure all funds stay in the region allocated due to the dedicated Trust boundaries we have in place.

I give and bequeath to Northern NSW Helicopter Rescue Service Limited ABN 40 002 862 026 (trading as Westpac Rescue Helicopter Service) for its general purposes:

(choose the appropriate bequest option below for your will)

The whole of my estate; or

_____ % of my estate; or

the Sum of \$_____; or

the residue of my estate; or

my property/asset (and insert description of property or asset) free of all duties.

The receipt of the Secretary or other authorised officer shall be a sufficient discharge to my Executor in respect of the gift made under this clause.

Optional wording - I wish for this gift to go towards the rescue helicopter service based in Hunter/New England North West/ Northern Rivers.