

FIA Conference 2024

Where **passion**
meets **purpose**

Brisbane
28 Feb – 1 Mar

FIA

CONFERENCE

Is It Worth Developing A Bespoke Gifts In Wills Programme?

GIFTS IN WILLS TRACK

Karl Tischler,
Founder & Idealist
Marlin Communications

Cherie Hansell,
Membership & Fundraising Director,
The Wilderness Society



Gifts in Wills Track
Sponsored By:

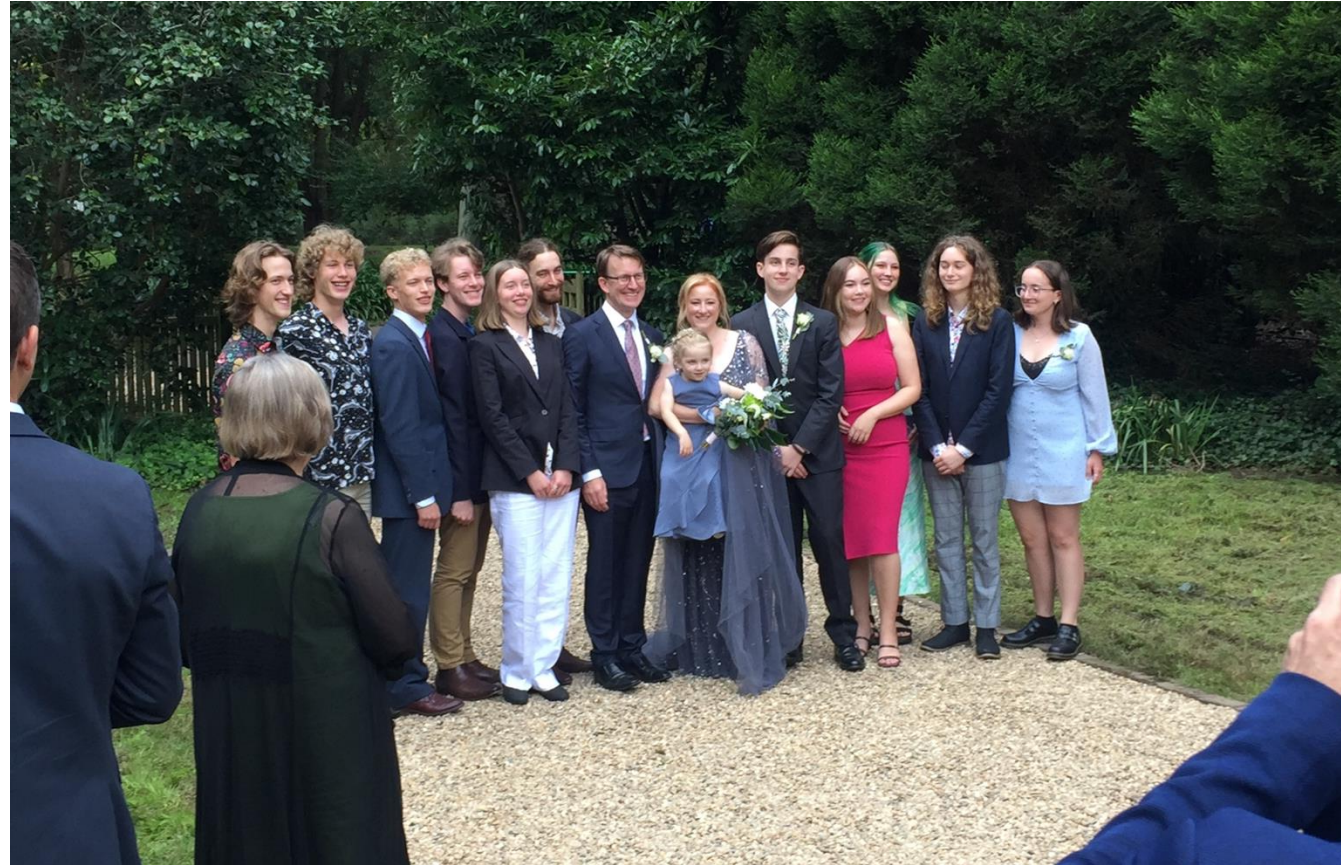


We would like acknowledge the Turrbal and Jagera peoples of the Meanjin the Traditional Owners and custodians of the lands on which we are meeting today, and we pay our respects to their Elders past and present.

**Let me start, by sharing a story from
my best friend's wedding.**



This is Ian.



And this is Ian & Verity on their big day..

**“I feel a little unqualified to talk about what love is...
but from what I’ve read, and what I’ve seen.. ’**

“...and most importantly what I’ve felt...”

..here are some thoughts; Love dies when we do not know how to replenish its source; it grows when it is fed; and just like charity or empathy—the love we give away is the only love we keep.”

And here's the thing...

Who amongst us really, truly and deeply knows what it's like to be a person who considers their own mortality?

Well, here's what we definitely know...

Life is Divergent.

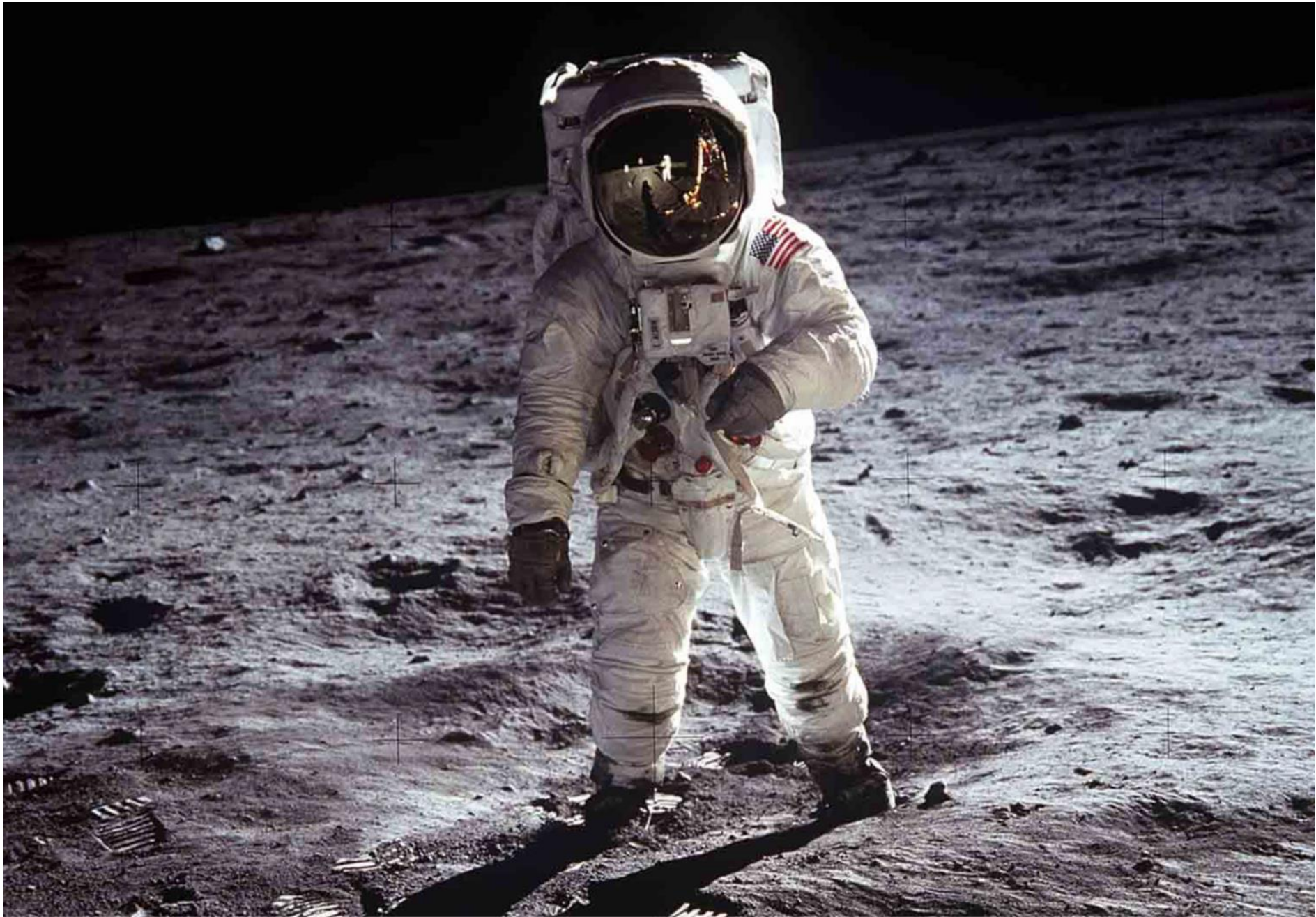


Here is how your bequestors see the world..

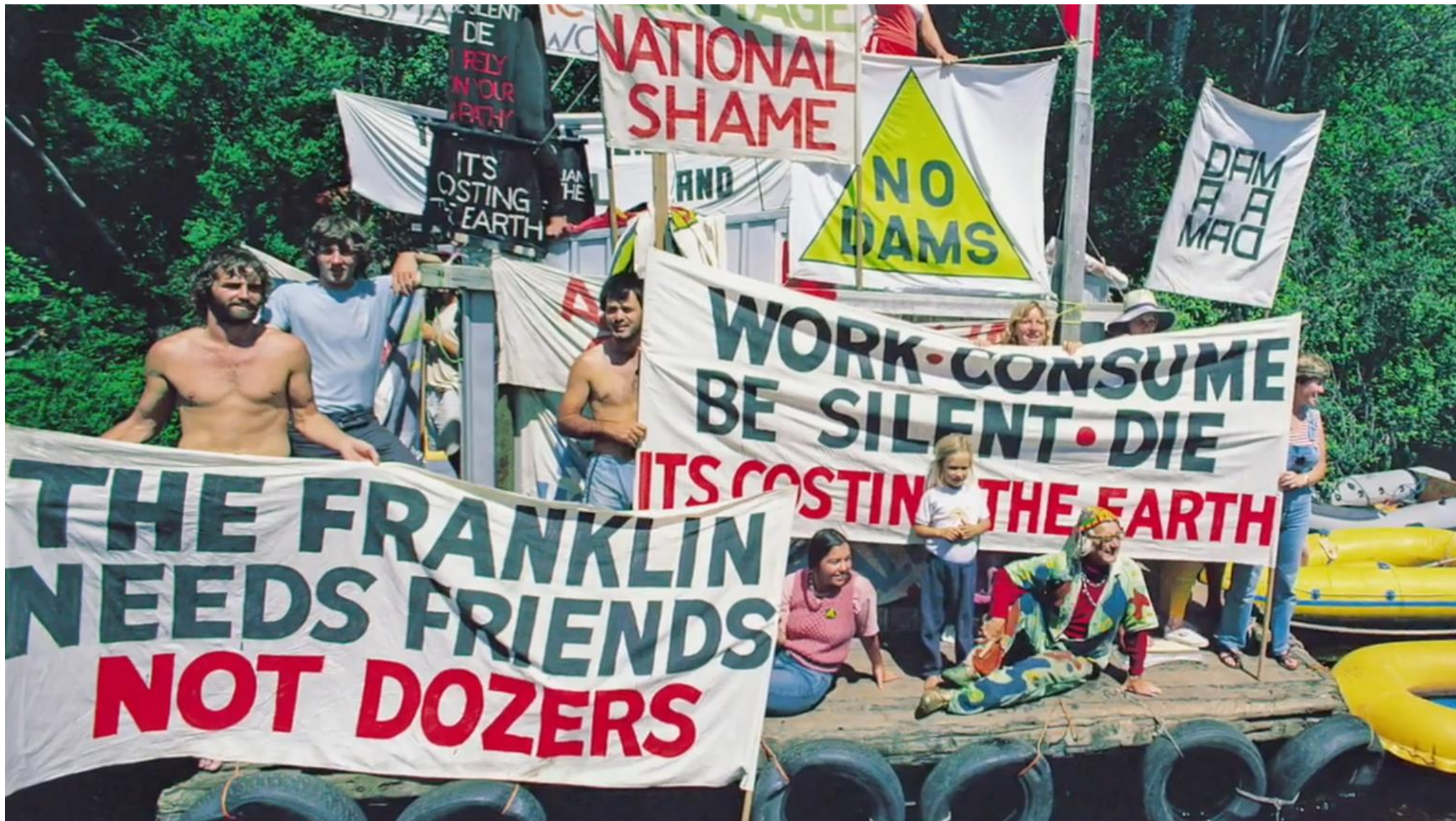












**THE FRANKLIN
NEEDS FRIENDS
NOT DOZERS**

**NATIONAL
SHAME**

**NO
DAMS**

**DAM
A
DAM**

**WORK • CONSUME
BE SILENT • DIE
ITS COSTING THE EARTH**

**ITS
COSTING
THE EARTH**













And yet, throughout all this, life finds a way.













Life is Divergent.

‘How can we understand something like love and death—until we’ve experienced or faced it?’

Symbolic Immortality.

*(But before we can get here,
surely there's a few questions...)*

‘What was the point of my life?’
‘How will I matter once I’m gone?’
‘What will my kids think of me?’
‘What do I really care about?’

You get to a point in life when the most precious thing you have is the past.

**In a Divergent world,
we seek Convergence.**

(And this is where we come in...)

*Over the years, it's been a privilege to work with these guys
and their GIW programmes...*



act:onaid



**Heart
Foundation**



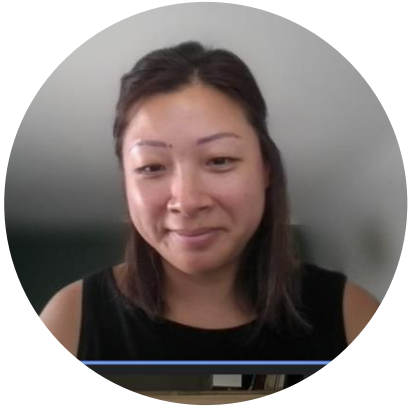
MARY MACKILLOP
today



everyone's family



And these five extraordinary people..



**Angie
Shum**

*Head of Gifts
in Wills
Heart Foundation*

*(formerly GIW
Manager Médecins
Sans Frontières
Australia)*



**Sharon
Wangman**

*Program Lead,
Gift in Wills
Uniting Care
(VIC TAS)*

*(formerly GIW
Manager Vinnies
Victoria for nine
years)*



**Jakki
Travers**

*Associate Director,
Philanthropy &
Planned Giving*

*(formerly at
The Smith Family
since 2015)*



**Kingsley
Edwards**

*Bequests
Manager,
Barnardos
Australia*

*(Current role,
two years)*



**Christine
Robinson**

*Senior Manager,
Supporter
Relationships
WWF Australia*

*(Current role, for the
past eleven years...)*

1

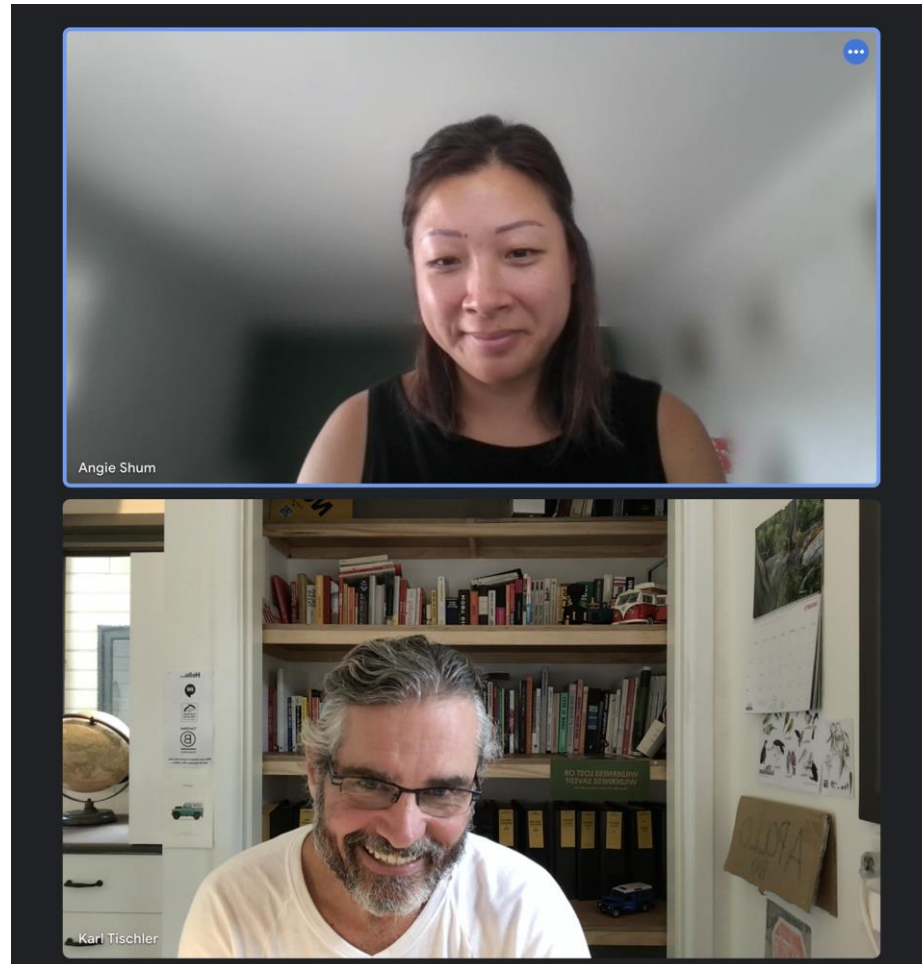
Médecins Sans Frontières Australia

“A legacy that will know no borders.”

1

Médecins Sans Frontières Australia

“A legacy that will know no borders.” — Angie Shum



CONFERENCE

A photograph showing a woman in a white medical vest on the left, smiling warmly at a woman on the right. The woman on the right is wearing a red headscarf and a red patterned top, and she is smiling broadly while holding a baby wrapped in an orange cloth. The background is a plain blue wall.

**A LEGACY THAT WILL
KNOW NO BORDERS**

The logo of Médecins Sans Frontières, featuring a stylized red figure with arms raised, resembling a person or a flame.

**MEDECINS SANS FRONTIERES
DOCTORS WITHOUT BORDERS**

INDEPENDENT. INTERNATIONAL. IMPARTIAL. THE MEDECINS SANS FRONTIERES STORY.



NEUTRALITY IN THE FIELD

A health worker discusses problems with an armed soldier. (Angola 1999)
© H.J. Burkard

Médecins Sans Frontières was set up in 1971 by a group of French doctors who were frustrated by the bureaucracy and government interference preventing humanitarian organisations from helping people in need.

Their approach – to do what it takes to reach people in need with as little red tape as possible, and to treat patients regardless of who they are or their religious or political affiliation – has informed the organisation's work ever since.

Our teams in the field witness the result of conflict, neglect and disaster which very often escapes broader international attention. We are committed to speaking out about these international crises to alert the public to the plight of the people we help.

Every day, more than 24,000 Médecins Sans Frontières field staff provide assistance to people caught in crises around the world. We have offices in 23 countries, including our office in Sydney, to support these teams.

Our work covers a wide range of medical issues including women's health, paediatrics, neglected diseases, HIV/AIDS, tuberculosis (TB), emergency surgery, response to outbreaks of infectious diseases and immunisation campaigns to prevent their spread.

Our projects are diverse and far-ranging. What doesn't change is the fact that it is your support which allows us to set up and run programs in some of the world's most conflict-ridden, inhospitable and inaccessible places.

The crucial factor in all of this is our ability to remain independent. In Australia, our funding comes exclusively from private donations. Globally, that figure is over 80%. This means we can provide medical assistance to people in need, whoever they are, and ensure our programs truly know no borders.

Your bequest will help us maintain this independence.



"I remember what one of my patients said to me in Kigali: 'Ummera, Ummera-sha'. It is a Rwandan saying that, loosely translated, means 'courage, courage, my friend – find and let live your courage.'"

James Orbinski recounting a story from his time in the field in Kigali, Rwanda 1994. He is pictured above examining a patient in Somalia, 1992. © Petterik Wiggers

OUR CHARTER

Médecins Sans Frontières:

- offers assistance to populations in distress, victims of natural or man-made disasters and armed conflict, without discrimination and irrespective of race, religion, creed or political affiliation
- observes neutrality and impartiality in the name of universal medical ethics and the right to humanitarian assistance
- demands full and unhindered freedom in the exercise of its functions.

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**YOUR LEGACY WILL
KNOW NO BORDERS.**

PEOPLE IN NEED

The medical care provided by local and international Médecins Sans Frontières staff can sometimes be the only chance people have to be treated for a neglected disease, helped through a difficult birth, or have their child vaccinated. © Yasuyoshi Chiba/Duckrabbitt

WHY I INCLUDED MEDECINS SANS FRONTIERES IN MY WILL
Bernard Chapman is a self-employed gardener and landscaper, and works on his own rainforest garden whenever he has time. Bernard supports Médecins Sans Frontières through regular donations and with a gift in his Will.

"It amazes me in our modern world that there are still millions of people starving, plagued by diseases such as HIV/AIDS and tuberculosis. I know the field staff of Médecins Sans Frontières help these people and give them hope, and a chance of a better life.

So I felt that as I have been quite lucky in my comfortable life, when I am gone I want this valuable organisation to benefit.

It was a very easy procedure to add the bequest. I was updating my Will anyway, and spoke to my lawyer about it. He added my bequest to my new Will without difficulty. I know my contribution will help Médecins Sans Frontières make a positive difference where it is needed.

Each day when I read the newspaper, I am saddened by much of what many of my fellow human beings have to battle with. But I feel better when I realise that organisations like Médecins Sans Frontières are helping those who need to be healed. I feel that the money I donate is used to really help people who are in need and crisis.

I would encourage anyone who can leave a bequest to Médecins Sans Frontières to do so. There are many organisations and charities needing help, but I like the way Médecins Sans Frontières uses the money so effectively. There is so much need in our crazy world, the more of us who make a contribution, the better!"



"I would encourage anyone who can leave a bequest to Médecins Sans Frontières to do so... I like the way Médecins Sans Frontières uses the money so effectively."

Bernard Chapman

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A LEGACY THAT WILL KNOW NO BORDERS

How to leave a bequest



MEDECINS SANS FRONTIERES
DOCTORS WITHOUT BORDERS

Contents

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How to make a bequest	4
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Cover Image: Médecins Sans Frontières staff provided post-operative physiotherapy and mental health care to patients in Port-au-Prince following the January 2010 earthquake (Haiti 2010). © Tristan Pfund

Below: Thousands of internally displaced people arrived at Endebess camp in the wake of Kenya's disputed 2007 election after their homes were attacked and burnt, forcing them to flee. Médecins Sans Frontières provided tents and latrines, and distributed kits containing blankets, soap, jerry cans and plastic sheeting. © Brendan Bannan



Thank you for your interest in leaving a bequest to Médecins Sans Frontières. This booklet includes the information you will need to include a bequest to Médecins Sans Frontières in your Will.

By remembering Médecins Sans Frontières with a bequest in your Will, you are making a unique commitment. Your legacy to Médecins Sans Frontières will help us to continue to provide medical aid where and when it is needed.

We rely on our supporters' generosity to enable us to respond immediately and effectively to populations in need of urgent medical assistance. Without you our work would simply not be possible. Whatever the amount, your contribution is invaluable.

A bequest is one of the most effective and long-lasting ways you can help Médecins Sans Frontières. Your promise of future support is deeply appreciated.

If you have included a bequest to Médecins Sans Frontières in your Will, please let us know. We would welcome the opportunity to thank you personally for this legacy of support.

At all times your privacy will be fully respected and the information you provide will remain strictly confidential.

How your bequest will be used

2

Writing your Will

If you already have a Will but would like to leave a gift to Médecins Sans Frontières, you can do so by making a simple addition to your existing Will. This is called a codicil.

If you do not have a Will at the moment, you can simply include a bequest when you write a new Will.

Whatever your circumstances, we would advise you see a solicitor to ensure your wishes will be followed.

When unexpected medical emergencies occur and our immediate action is required, it is essential that all our programs can continue without interruption. Financial flexibility is crucial to our ability to respond to priority needs, so we ask that you do not designate your gift to a particular project, country or region.

Why I included a bequest

"It was a very easy procedure to add the bequest. I was updating my Will anyway... I know my contribution will help Médecins Sans Frontières make a positive difference where it is needed."

Bernard Chapman,
Médecins Sans Frontières supporter

Below: Nurse caring for premature baby in a Médecins Sans Frontières maternity hospital. (Haiti 2009) © Espen Rasmussen



How to make a bequest

4

Types of bequests

1. A **residuary bequest** is the most effective way to leave a bequest to Médecins Sans Frontières. It is a gift of what remains after you have made provisions for your loved ones. A residuary gift will keep up with inflation. It will mean your bequest will achieve as much in our projects in the future as you would like it to now.
2. Leaving a **percentage of your estate** allows you to decide what proportion of your total estate you would like to give to Médecins Sans Frontières. A percentage gift will also keep up with inflation.
3. A **pecuniary bequest** is a fixed sum of money to be left to Médecins Sans Frontières.

For your solicitor

We suggest you take this information with you when you visit your solicitor to draft or update your Will.

Recommended bequest wording

"I give and bequeath to Médecins Sans Frontières Australia, a company limited by guarantee, of PO Box 847, Broadway, NSW 2007 Australia:

- the residue, or
- [......] percent of my whole estate, or
- [......] percent of the residue, or
- the specific sum of \$[.....]

to be used for its general purposes".

Your solicitor may also require the following details:
ABN: 74 068 758 654
Registered Charity Number: CFN 11960



A LEGACY THAT WILL **KNOW NO BORDERS**

Leave a gift in your Will to Médecins Sans Frontières

By remembering Médecins Sans Frontières with a bequest in your Will, you are making a wonderful commitment. Your legacy will help us continue to provide medical assistance to people in need, whoever and wherever they may be. Download our bequest information pack today!

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1

Médecins Sans Frontières Australia

“A legacy that will know no borders.” — Angie Shum

Is it worth creating a bespoke GIW programme?

‘Absolutely.’

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1

Médecins Sans Frontières Australia

“A legacy that will know no borders.” — Angie Shum

Is it worth creating a bespoke GIW programme?

- Served as a great foundation; already had a high degree of interest from warm supporters.
- Important to have high-quality materials.
- Proposition was very strong, very unique; no other organisation could ‘steal it’.
- Important to reduce a complex organisation and its mission, to something simple.

1

Médecins Sans Frontières Australia

“A legacy that will know no borders.” — Angie Shum

Is it worth creating a bespoke GIW programme?

- **2,500-3,000 (approx) confirmed bequestors during Angie’s time at MSF.**

1

Médecins Sans Frontières Australia

“A legacy that will know no borders.” — **Teneale Cameron**

Is it worth creating a bespoke GIW programme?

<i>Year</i>	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Confirmed bequestors	1,514	1,767	1,832	2,144	2,257	2,527	2,678	2,796	3,214	3,337

1

Médecins Sans Frontières Australia

“A legacy that will know no borders.” — **Teneale Cameron**

Is it worth creating a bespoke GIW programme?

<i>Year</i>	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Bequest Intender*	1,665	1,910	1,933	2,243	2,266	2,294	2,452	2,506	3,239	3,257

**Bequest intender: someone who is at the stage of writing their will and interested in leaving a gift to MSF.*

1

Médecins Sans Frontières Australia

“A legacy that will know no borders.” — **Teneale Cameron**

Is it worth creating a bespoke GIW programme?

<i>Year</i>	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Bequest Enquiry*	3,853	4,391	4,480	5,019	5,732	6,272	6,479	6,536	6,646	6,693

**Bequest enquiry: someone who is interested in learning more about leaving a gift in their Will to MSF but not yet at the point of writing their Will in the short term.*

2

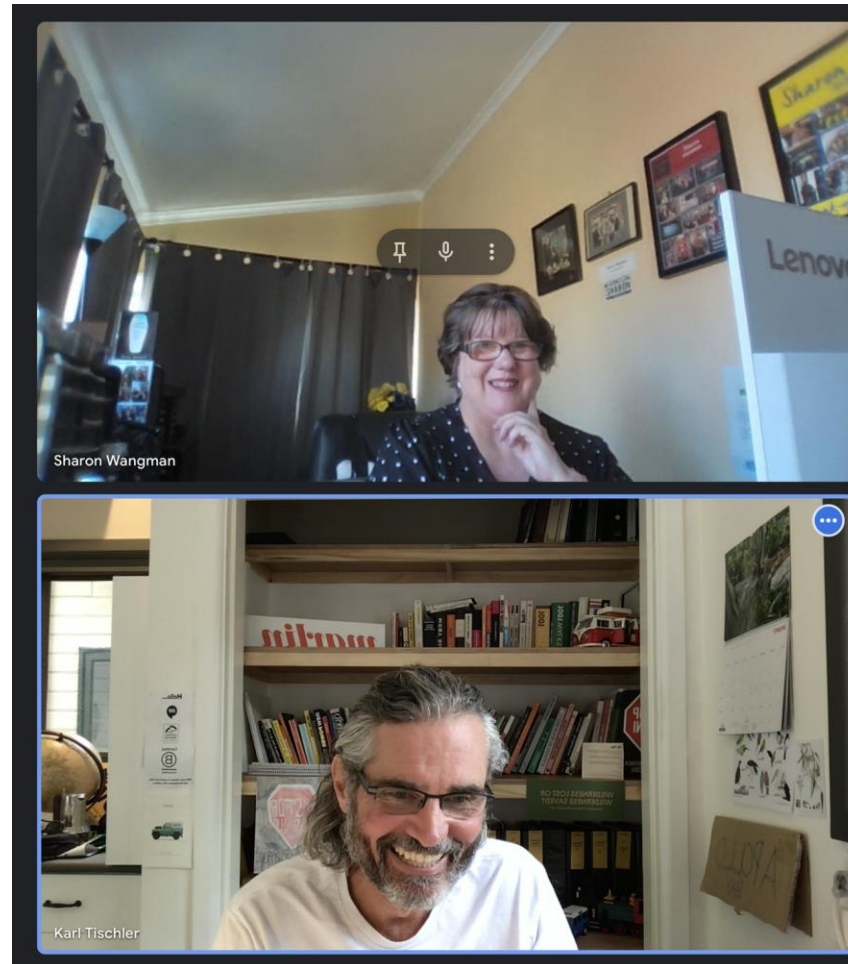
Vinnies Vic

*Frederic's Fellowship.
'A legacy for good.'*

2

Vinnies Vic

“Frederic’s Fellowship. A legacy for good.” — Sharon Wangman



A LEGACY FOR GOOD



CONFERENCE



St Vincent de Paul Society
VICTORIA
good works



It's amazing what we can achieve when we put our values into action.

We can bring hope where there is despair. We can bring relief where there is desperation. We can bring joy where there are tears. Through acts of kindness, both great and small, we can transform entire lives.

This is the good work that we do together every day. And like you, St Vincent de Paul Society Victoria will never stop working to shape a more compassionate society.

When we do good in the world, our actions live on. They live on in the people we have helped, and in the people we inspire to help others. This is why we call what our volunteers do in the community every day our 'Good Works'.

Our founder, Frederic Ozanam, established an international philanthropic movement that has been helping people for more than 165 years. Like him, you can support future generations of vulnerable Victorians.

As he said, **"Let us do without hesitation whatever good lies at our hands."**

If you believe in a just world for all, make that your legacy. When you commit to leaving us a gift in your Will, we commit to continuing the work that you believe in through our Good Works.

Sue Cattermole
 Sue Cattermole, CEO
 St Vincent de Paul Society Victoria



YOUR LEGACY IN ACTION

The St Vincent de Paul Society has provided practical and emotional support to Victorians in need since 1854.

Across Victoria, our network of more than 12,000 volunteers bring hope and understanding to people who are doing it tough.

Every day in our Vinnies Shops, on our Vinnies Soup Vans, on the phone or in people's homes, our volunteers understand the value of human connection.

Our volunteers offer practical assistance, with respect and compassion, that can help alleviate and lift people out of disadvantaged circumstances.

They help make ends meet by putting food on tables, heating homes in winter, educating young minds and listening in times of crisis.

By remembering St Vincent de Paul Society Victoria in your Will, you'll help ensure we can continue to provide practical frontline support, advocacy and friendship to the most vulnerable members of our community.



Our impact


326,394
 people assisted across Victoria

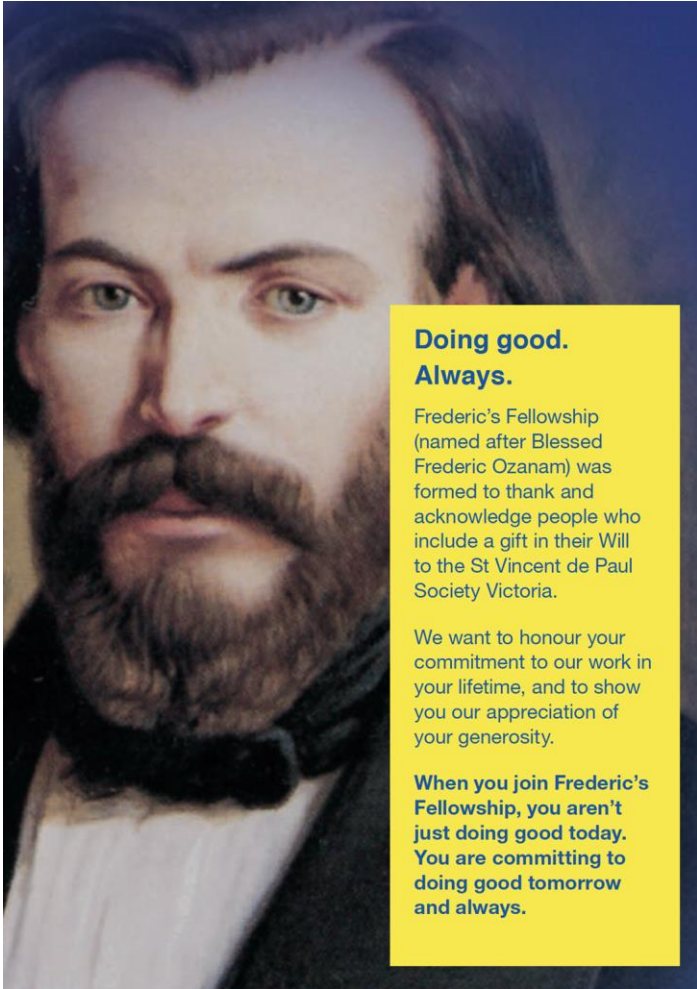

135,576
 home visits made


67,096
 calls received at our Box Hill call centre


211,750
 soup van meals served


7,373
 hours of student tutoring provided

2018-2019



**Doing good.
Always.**

Frederic's Fellowship (named after Blessed Frederic Ozanam) was formed to thank and acknowledge people who include a gift in their Will to the St Vincent de Paul Society Victoria.

We want to honour your commitment to our work in your lifetime, and to show you our appreciation of your generosity.

When you join Frederic's Fellowship, you aren't just doing good today. You are committing to doing good tomorrow and always.



**LEAVE A LEGACY
FOR GOOD**

Investing in our Good Works is a reflection of your beliefs today, tomorrow and for always.

For more information about leaving a legacy, please contact our Gift in Wills Manager on 03 9895 5821 or email bequest@svdp-vic.org.au.




**"YOURS MUST BE
A WORK OF LOVE,
OF KINDNESS.
YOU MUST GIVE
YOUR TIME,
YOUR TALENTS,
YOURSELVES."**

BLESSED FREDERIC OZANAM

**LET YOUR
GOOD WORKS
CONTINUE
TODAY,
TOMORROW
AND ALWAYS**

To find out more about leaving a legacy that changes lives, please contact our Gift in Wills Manager.

bequest@svdp-vic.org.au
03 9895 5821



HOW TO LEAVE **A LEGACY**

Every legacy, no matter its size, contributes to the Good Works we do for vulnerable Victorians. Leaving a gift in your Will is a simple, yet powerful way to help those experiencing disadvantage after you are gone.

TYPES OF GIFTS

There are a variety of ways to include a gift in your Will to the St Vincent de Paul Society Victoria. Your solicitor or one of our honorary solicitors can help you choose the type of gift that is most appropriate for you.

Residue:

The whole or part of the residue of your estate once all other legacies and expenses have been deducted.

Percentage:

A set portion of your estate.

Specific sum:

You may nominate a specific sum of money in your Will.

Property:

A gift of real estate.

Stocks & Shares:

A percentage of stocks and shares in your portfolio.

Superannuation and/or Life Insurance policies:

Nominate the St Vincent de Paul Society Victoria Inc. as a beneficiary.

HONORARY SOLICITORS

When the time is right for you to update your Will, the St Vincent de Paul Society Victoria now has a number of solicitors who are generously giving their time free of charge to assist you in writing a simple Will or adding a codicil to an existing Will when you include the Society in your estate plans.

We would be delighted to connect you with an honorary solicitor. Please call our Gift in Wills Manager on 03 9895 5821.

WORDING FOR YOUR WILL

Your Will is one of the most important documents you will ever prepare. Should you generously decide to include a gift to the St Vincent de Paul Society Victoria in your Will, please use the following wording to ensure your wishes are fulfilled:

*I give to the St Vincent de Paul Society Victoria **Inc.** ABN: 28 911 702 061 in the aid of (please insert the appropriate following statement)*

The charitable work of the Society at its discretion

OR

the charitable work of the Society in the specific field of

_____ *AND*

The whole of my estate, or

_____ *percentage of my estate, or*

_____ *percentage of the residue of my estate, or*

The sum of \$ _____

Free from all duties and testamentary expenses to St Vincent de Paul Society for its general purposes and I direct that the receipt of the organisation shall be full and sufficient discharge to my executors for this gift in my Will.

Gifts made unconditionally can be directed to the area of greatest need. If you choose to leave a gift to a specific area, we recommend you express this as a wish, not a condition. This gives us the flexibility to transfer your gift to a similar area of work if it is no longer possible to fund the specific area you requested.



A LEGACY FOR GOOD

This is to certify that

has made provision in their Will to the St Vincent de Paul Society Victoria.
your precious gift will help support and improve the lives of the most vulnerable in our community today, tomorrow and always.
The St Vincent de Paul Society Victoria thanks you.

Sue Cattermole, CEO
St Vincent de Paul Society Victoria

SCOPE / AIM

The Frederic's Fellowship

In 2015 Frederic's Fellowship, a bequest group, was established. We named the group in honour of Blessed Frederic Ozanam, as tribute to a man who laid the foundation and created a vision for thousands of men and women who have since served and continue to serve people in need with hope and dedication. Naming the group in his honour allowed us to celebrate his contribution now and well into the future.

Frederic's Fellowship serves an important purpose by enabling us to acknowledge, during their lifetime, those of our friends who are generous enough to support the work of St Vincent de Paul Society Victoria through a bequest in their Will.

The Frederic's Fellowship group regularly holds lunches and special functions, allowing its members to meet with other likeminded people, as well as seeing firsthand the difference their bequest will make.

Members of Frederic's Fellowship receive:

Invitations to VIP functions throughout the year

An exclusive Certificate of Appreciation signed by the State President

A uniquely designed lapel pin. This pin will identify the donor as someone that that made a special contribution to meet the growing needs of people in our community.

Fellowship functions may change from time to time, but in essence include an invitation to:

1. The Frederic's Fellowship Christmas luncheon, which is usually held on the last Wednesday of November each year.
2. One other smaller function held in May. (mid-year)

2

Vinnies Vic

“Frederic’s Fellowship. A legacy for good.” — Sharon Wangman

Social proof in GIW programme design.

When you create a tribe, it:

- Enhances identity and belonging
(human wish for security and certainty)
- Amplifies your messaging
- Creates greater trust and credibility
- Improves conformity and reinforcement to the tribe
- Helps with modeling and imitation
- Provides authority and expertise

2

Vinnies Vic

“Frederic’s Fellowship. A legacy for good.” — Sharon Wangman

Is it worth creating a bespoke GIW programme?

‘100% it was worth it!’

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2

Vinnies Vic

“Frederic’s Fellowship. A legacy for good.” — Sharon Wangman

Is it worth creating a bespoke GIW programme?

BQ/ GIQ intention	2015	2023
Confirms	201	450
Considers	0	85
Intending	1	122
Requests	1746	341

2

Vinnies Vic

“Frederic’s Fellowship. A legacy for good.” — Sharon Wangman

Is it worth creating a bespoke GIW programme?

2021: A GIW acq. test...

BQ/ GIQ intention	2021
Confirms	22
Considers	16
Intending	12
<i>GIW response rate</i>	<i>3.57%</i>

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2

Vinnies Vic

“Frederic’s Fellowship. A legacy for good.” — Sharon Wangman

Social proof in GIW programme design.

Of note...

- GIW proposition was a solid foundation to a conversation.
- It facilitated clarity about audience faith and their values.
- Don’t underestimate the importance of Social Proof; it’s vital.
- Make everything a positive; there’s nothing dark about doing good.
- **‘...if you’re not asking, someone else is!’**

3

The Smith Family

“Gifts in Wills: A Gift for the Future”

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3

The Smith Family

"Gifts in Wills: A Gift for the Future." — Jakki Travers



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**Your legacy will change
the lives of Australian
children in need.**



*"I feel so lonely at school.
I feel like I can't keep up.
All the kids know I'm poor."*

– Jenny*, aged 8.

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GIFTS IN WILLS
A gift for the future



The reality of poverty in Australia



For children like Jenny*, disadvantage at home leads to difficulties at school. They start their education without the early literacy and numeracy skills of their classmates. They are behind before they even begin.

Since 1922, The Smith Family has been dedicated to improving the lives of disadvantaged Australian children. In the last 30 years we've focused on educational programs to help children make the most of their school years.

Research proves that supporting a disadvantaged child's education is a powerful way to make lasting change. Last year we supported more than 124,000 Australian children in need and their families through our programs. Sadly, for every child we can help, there are thousands more who need our help.

With your help, more children like Jenny will get the skills they need to catch up, keep up, do well at school and create a better future for themselves.

* Jenny's name and associated image have been changed to protect her identity.
¹ Australian Bureau of Statistics (2013). Labour force status and other characteristics of families, June 2012.

A gift for the future

Australia's future is in your hands. By leaving a gift in your Will, you can change the lives of Australian children in need.

Too many Australian children are trapped in a cycle of poverty. Their financial disadvantage at home turns into disadvantage at school as they struggle to catch up with their classmates and fall further and further behind. Often, such children become disenchanted – losing their drive and resigning themselves to a life of failure. The hardship they are born into continues into adulthood.

The Smith Family is dedicated to breaking the cycle of poverty for

disadvantaged children and helping them onto the path of achievement. Through our *Learning for Life* programs we provide educational support to the children who need it most.

Children like Jenny have proven that with extra reading support, homework help and a guiding hand, they can thrive. That's what *Learning for Life* provides.

But you can also help. Please give disadvantaged Australian students the out-of-school support they need to make the most of their education.

Today, you can change their future.



84.2% of *Learning for Life* students, who left school in Years 10–12 were engaged in work and/or study, 12 months after leaving the program. Of the remaining 18%, four in five were actively seeking employment, and one in six were volunteering.

The difference you can make



"Jenny's confidence is growing each day. Her future is changing with every week she spends doing Learning for Life."
– Jenny's mother

Year after year we see our learning support programs change lives, helping young Australians to break the cycle of disadvantage.

Your legacy will ensure that future generations of Australian children have access to the support they need to get the most out of their education.

Whether this means staying in school until Year 12, taking up an apprenticeship, attending TAFE or university, you're helping young Australians to make the most of

their education – so they can create a better economic future for themselves and their families.

You're not just helping one child today, you're joining with The Smith Family and other like-minded individuals to make a difference to a whole generation of Australian children who need a hand up not a handout.

With your help, the next generation of poor Australian children doesn't have to become the next generation of poor Australian adults.

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Giving the next generation a go

Heather and Rod Hawkins, supporters of The Smith Family



“I’m a school teacher and I’ve worked with children from all kinds of backgrounds.

When I became a teacher at our local school I started to become aware of the need for further help in education for disadvantaged students. The need for focused attention is especially evident when you have children who’ve had setbacks and struggles in their life – whether through immigration or growing up in poor families.

These kids don’t have the confidence in their own abilities, that they’re in the right place and that people will help them.

Coming from behind, feeling different and out of place – to feeling empowered, is a very difficult leap to make.

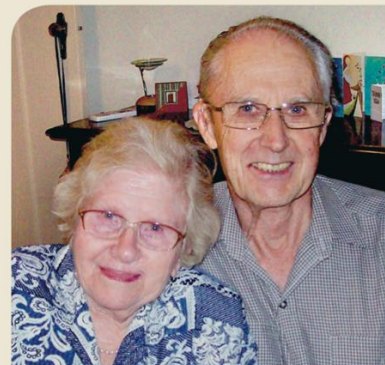
Education has enabled us to emigrate (twice) and to create successful lives in different countries. We want that for all Australian kids. That’s why Rod and I have left a gift in our Will for The Smith Family. I’m completely confident in The Smith Family’s commitment to education. We’ve had experience with lots of charities, and we really feel the money is well accounted for and will be well spent with The Smith Family – they’re a really efficient organisation.

School is where children can build their future. We want to give the next generation a go. We want to help the ones who just don’t have the economic and social support to cope with the demands of education on their own.”

– Heather

A family commitment

Geoff and Julie Winders speak about their parents’ legacy



“Our mum, Joan (pictured above with our dad John), trained as a nurse at RPA (Royal Prince Alfred Hospital in Sydney) and spent much of her working life in the palliative care ward at Greenwich Hospital.

She met dad, John, on a boat to Australia in 1951 when he was emigrating as a ‘10 pound Pom’. Dad worked as an engineer and always felt that Australia provided him and his family, with so many opportunities. Mum and dad decided early on that they would like to make an ongoing contribution to The Smith Family.

When mum and dad told us, about 10 years ago, that they were including The Smith Family in their Will, it wasn’t a shock at all. It actually felt good to know that they were

backing up their passion for helping others. They had been donating to The Smith Family for as long as we could remember and it seemed like a natural progression of their giving.

It’s wonderful to think that their gift is now helping so many deserving students to get the most out of their education.

Whether it’s helping to pay for school outings or text books, football boots or even school uniforms, it’s so good for us to know that mum and dad’s legacy is living on and they are continuing to provide disadvantaged Australian children with the opportunities they need to help them thrive at school and into the future.

In fact, knowing that mum and dad had left a gift in their Will to charity has been a really good lesson for our families and we have decided that we would like to do the same.”

– Geoff and Julie

Your legacy will change
the lives of Australian
children in need.



*"If I learn to read better,
I'll have a better future."*

— Jenny*, aged 8.

GIFTS IN WILLS
A gift for the future



everyone's family

*Jenny's name and associated image have
been changed to protect her identity.

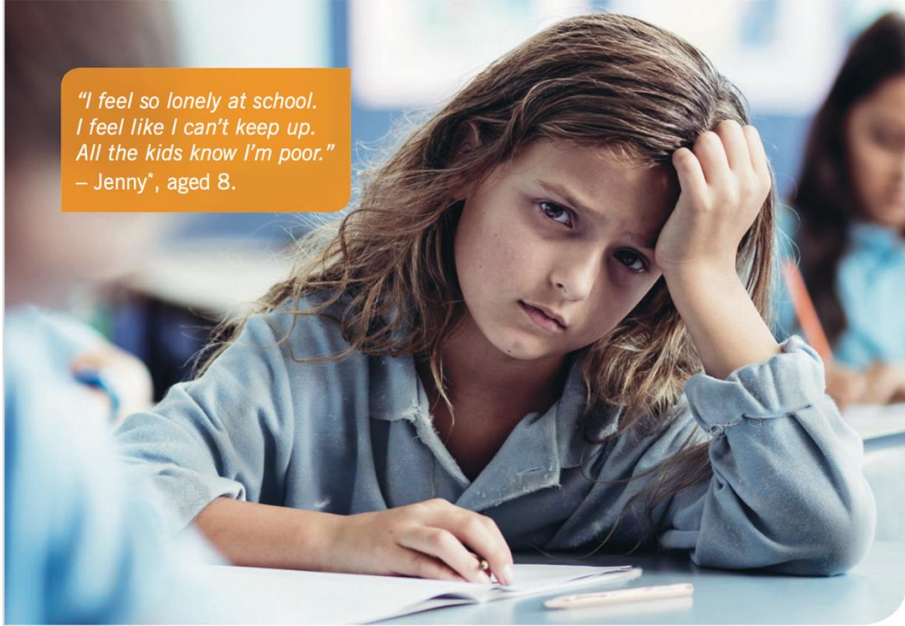
The Smith Family Gifts in Wills Charter:

1. We realise that your family and loved ones will always come first. We are very grateful for any gift you may choose to leave The Smith Family after you have looked after them.
2. A gift in your Will is an important commitment. If you do leave a gift to The Smith Family, we would love to hear from you. We want to say thank you properly. That said – if you wish your decision to remain private, we will respect that and have no further contact.
3. We will always respect your privacy. We recognise and appreciate that your Will is completely personal to you.
4. We will give you, your family and loved ones the opportunity to engage with The Smith Family, and see firsthand the work made possible through Gifts in Wills.
5. We will use your gift carefully and cost effectively to help disadvantaged young Australians to succeed at school so they can create better futures for themselves.
6. We will show your family and loved ones compassion, integrity and honesty in administering your gift, and handle all Gifts in Wills with the utmost respect and gratitude.

GIFTS IN WILLS
A gift for the future



everyone's family



*"I feel so lonely at school.
I feel like I can't keep up.
All the kids know I'm poor."
– Jenny*, aged 8.*

Your legacy will change the lives of Australian children in need.

There are over 630,000 Australian children living in disadvantaged homes in Australia¹. They start their education without the early literacy and numeracy skills of their classmates. They are behind before they even begin.

The Smith Family has been dedicated to helping Australian children in need since 1922.

Research proves that supporting a disadvantaged child's education is a powerful way to make lasting change.

Each year we help thousands of children with their education. Our out-of-school learning

support and mentoring programs help children catch up, keep up and thrive at school.

Sadly, each year, for every child we can help, there are still thousands more who need the focus and attention of The Smith Family.

A gift in your Will can help poor Australian children develop the skills and self-confidence they need to succeed at school.

Together, we can make sure that every Australian child has a chance to create a better future for themselves.

This is your legacy in action.

GIFTS IN WILLS

A gift for the future

Contact Jakki Travers, Gifts in Wills Manager on 02 9085 7118 or toll free 1800 024 069, or visit thesmithfamily.com.au

* Jenny's name and associated image have been changed to protect her identity.
¹ Australian Bureau of Statistics 2013.



everyone's family

FIA

CONFERENCE



<Title><Fullname>
<Companyname>
< MailingAddress_Line1>
< MailingAddress_Line2>
< MailingAddress_Line3>
< MailingAddress_Suburb_City> < MailingAddress_State> < MailingAddress_Postcode>

Dear <Salutation>,

I was thinking about you today after I received a lovely letter from one of our kind supporters, Judith Mitchell.

Judith has very kindly allowed me to share this letter – and her story.

Sadly, Judith's brother Peter recently passed away. Before he did, Peter wanted to ensure that he made a final gesture towards a cause he believed in: a better future for Australian children in need. He chose The Smith Family for the children we support.

After receiving Peter's kind gift, Judith and I spent some time discussing how The Smith Family works, our purpose in supporting the education of disadvantaged children and the long-term effect that this has on their lives.

Judith is a former teacher, and is understandably a passionate advocate for how education changes lives as she has seen first-hand the impact education can make. I am very touched that she, too, has decided to leave a gift in her will to The Smith Family.

I know that you understand our work, what we aim to do and why – and I can't thank you enough for the difference you've made. Your previous support is greatly appreciated and is already improving the life outcomes of many Australian children.

However, as Judith puts it so beautifully, and as Peter has done, there is another way you can change children's lives.

The children The Smith Family help live in disadvantaged families. Too often the family struggles that affect a child's home life, can flow on to affect their school life too.

Poverty takes away so much from children. It's not that they aren't loved; or because they aren't capable, and it's not because they aren't smart – but simply because poverty means they don't have the same opportunities or resources as their classmates.

And this lack can lead to them falling behind at school. Unable to catch up they can become disengaged from their learning. And maybe, sad to say, drop out of school altogether.

But with your help we've been able to change this. Thanks to you our programs

have made a huge difference to the lives of children in need. Our students are:

- **attending school more often,**
- **completing school in greater numbers, and**
- **going on to further study, training or a job.**

Many of our supporters – people like Judith – have made a commitment to end poverty in Australia, one student at a time. They understand that education is one of the very few proven pathways to change a child's life away from poverty – to one that is a life filled to the fullest. Their legacy is to enable educational support for girls and boys who need it most. When the time comes, it will be a powerful gift that will continue to give.

To ensure that this change continues, I'd like to ask you to consider leaving a gift in your Will to The Smith Family.

I know that you share our belief that every child deserves a chance; and I hope too that you share Judith's passion to help students to reach their potential.

Creating a legacy that demonstrates your lasting support is such a simple thing to do, and an act that will have an enormous impact. An impact that will change not just one child's life, but one that will change the lives of thousands of Australian children.

If this is something that you may want to do, then please don't hesitate to contact me. I am happy to answer any questions you may have.

On behalf of the entire team at The Smith Family – and most importantly, on behalf of the children who will benefit because of your generosity – thank you so much.

Yours, with deepest thanks,

Jakki Travers
Gifts in Wills Manager
The Smith Family



JUDITH MITCHELL

Dear Jakki,

It was really good to meet you when you came to see me about the gift that my brother, Peter, left to The Smith Family when he died.

Until I read the material you shared with me, I hadn't considered leaving a bequest to The Smith Family: I didn't know anything about the breadth of the programs run by this amazing organisation.

However, I can now see what Peter meant when he told me that he had chosen to make a gift in his will to The Smith Family as well "because of all that they do for poor students and their families".

After talking with you and finding out more, I have redrafted my Will to make provision for a bequest to The Smith Family as well. I felt that this was something I could do to somehow remember Peter.

As an ex-teacher, I have seen first-hand the awful difficulties some children have at school, how lasting they can be, and how they undermine what a child's 'best' can be. I understand only too well the importance of on-going learning support that helps students to reach their potential.

I have also, thanks to your advice, begun going to VIEW lunches so that I can further support The Smith Family. It's very moving to hear the messages received from the students whom the group sponsors, and from their parents, about the difference The Smith Family programs are making to their lives, especially in the way it encourages students to remain at school longer and perhaps go on to study further after Year 12.

Thank you, again, for your contact and for all you've told me about your organisation. I do hope that others will do as I have done so that more students and their families will be given a helping hand on their journey through their school years.

Keep up the good work!

Judith Mitchell



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3

The Smith Family

“Gifts in Wills: A Gift for the Future.” — Jakki Travers

Is it worth creating a bespoke GIW programme?

‘Totally.’

FIA

CONFERENCE

3

The Smith Family

“Gifts in Wills: A Gift for the Future.” — Jakki Travers

Is it worth creating a bespoke GIW programme?

Benefits of creating a bespoke GIW:

- Internally identifiable;
- Drove respect (individually, team and throughout the organisation)
- Increased accountability for GIW efforts and results;
- Was simple to understand, ensured clarity and reduced the complexity of much programme work into bite-sized chunks.

3

The Smith Family

“Gifts in Wills: A Gift for the Future.” — Jakki Travers

Is it worth creating a bespoke GIW programme?

‘Our supporters could see themselves in a shared story...’

FIA

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3

The Smith Family

“Gifts in Wills: A Gift for the Future.” — Jakki Travers

Is it worth creating a bespoke GIW programme?

BQ/ GIQ intention	Income
2015: GIW	\$3-4 million
2023: GIW	\$11.04 million

3**The Smith Family**

“Gifts in Wills: A Gift for the Future.” — Jakki Travers

Is it worth creating a bespoke GIW programme?

BQ/ GIQ intention	FY 2016	FY 2023
Value of GIW pipeline:	\$10.4 m	\$100+ m
Number of supporters in the GIW Funnel:	100	11,000

3

The Smith Family

“Gifts in Wills: A Gift for the Future.” — Jakki Travers

Jakki’s top tip?

**‘Single most important thing?
Ask.’**

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4

Barnardos Australia.

*“Barnardos Big Hearts:
Big hearts. Big hopes. Big impact.
Your Big Heart can change a child’s life.”*

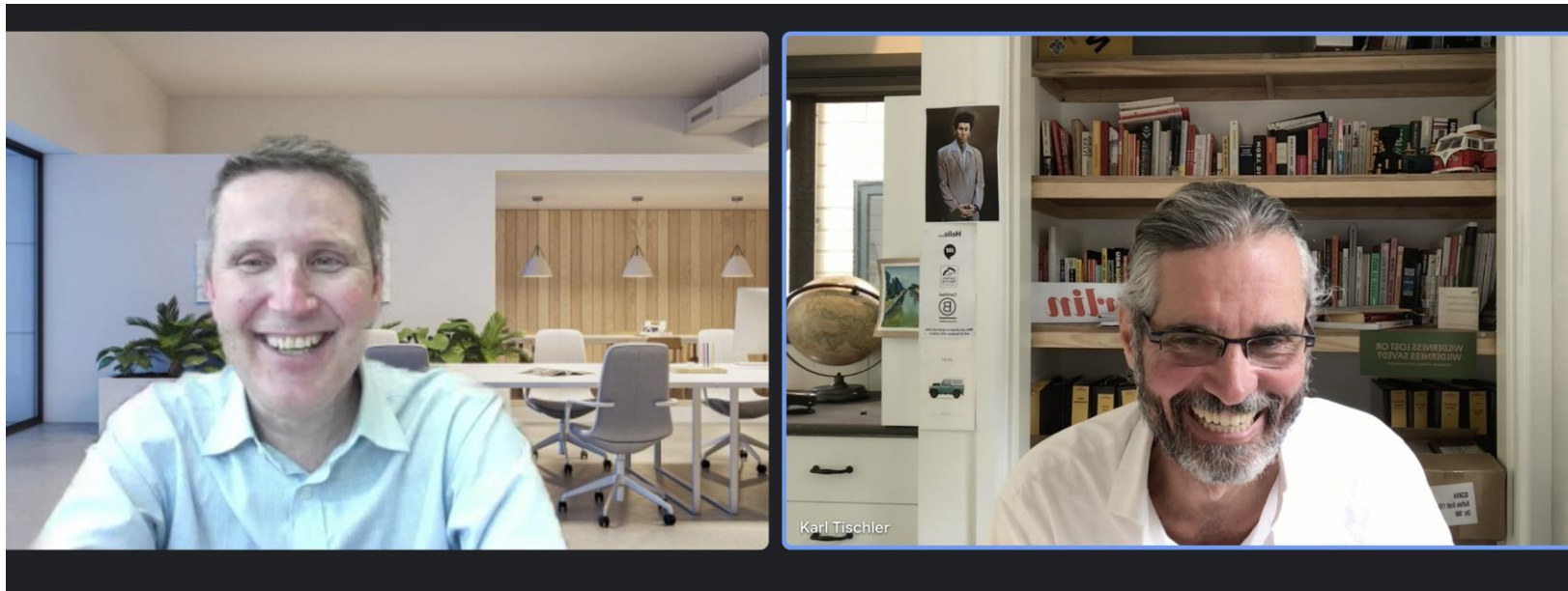
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CONFERENCE

4

Barnardos Australia.

"Barnardos Big Hearts: Your Big Heart can change a child's life." — Kingsley Edwards





Big hearts.
Big hopes.
Big impact.



How you can become a
Barnardos Big
Heart





Imagine a future...

where no child is neglected,
where no child is assaulted,
where every child feels safe.

I want that future,
and I am sure you do too.

Because every child needs a champion like you.

Raising children is challenging but when you add the stresses of poverty, homelessness, violence, addiction and mental health issues, families can fall apart. Sadly, it is children who suffer most through abuse and neglect.

But with your support, Barnardos can continue to use our evidence-based programs to help break the vicious cycle of child abuse for future generations.

This means being big-hearted and brave, even when it may be difficult to do so. But that's how you make an enormous impact on the lives of Australia's most vulnerable children.

There's nothing more generous and big-hearted than leaving a gift in your Will, and I thank you for your consideration. It's a great privilege to share details of our work with you and show the ways in which your legacy can help children grow safely and fulfil their potential.

This is at the heart of everything we do at Barnardos, and I hope you will join us on this incredible journey.

Deirdre Cheers
CEO, Barnardos Australia

You can help children reach their full potential

Every Gift in Will – no matter how big or small – will help to ensure Barnardos has secure and stable funding for vital programs and services for children well into the future.

Getting in early for preventative work and building parenting capacity takes specialists and funding.

With a few simple lines in your Will, you can help children grow up in a safe and

nurturing home, free from violence and suffering. While you'll never know the children that you help, we can promise you – really promise you – that your gift will truly transform a child's life.

We know that, because every day, through over 100 different programs, we make positive things happen for children and young people in very difficult circumstances.



61 children found homes through open adoption in 2020

Foster, kinship care & adoption

We find stable, caring homes for children at times of family crisis. If the Children's Court has permanently separated a child from their parents, we find them forever homes. We also support extended family and members of the community to take on the care of a child they know.



Advocacy for children

We advocate for policies and practices which will assist children, young people and their families. We respond to calls for advice by Royal Commissions, State, Federal, Territory and local governments by making submissions and appeals.



1,600 children helped through youth programs in 2020

Adolescent services

We assist at-risk young people through a range of outreach programs including early intervention for 12-18 year olds who are experiencing homelessness or drug and alcohol issues, and caseworker support for young people in the juvenile justice system.



Education programs

When families are experiencing poverty or breakdown, children can easily fall behind in their education. Barnardos provide a range of education-based programs including playgroups, home-based parenting programs and Learning Centres that provide vital educational support to disadvantaged children, helping them to break the cycle of poverty.



Family Support

Many parents we work with haven't had positive role models, and need a helping hand as they learn to parent their children in safe and nurturing ways. Our programs help parents connect with the right supports at the right time to strengthen relationships and enhance safety.

1,225 parents attended programs in 2020 to learn how to better support their children

Jill's Big Heart will never give up



Jill Coggan doesn't know where she'd be today without her adoptive mother's big heart. At 76, she is proud to share her love with the next generation.

Jill's mother Margaret was a single woman in her 40s, who ran a post office on the outskirts of London, when she adopted her.

Margaret was a well-loved and respected member of their community. She volunteered during the war with Dr. Barnardos services in England and was known locally for her kindness and generosity.

In the challenging post-war years, post office customers would give her extra ration coupons so that Jill would have plenty to eat.

Jill always felt her voice was valued in their small family, even as a child.

"There was no way that anything could ever harm me with her around," she says.

Tragically, when Jill was just eleven years old, Margaret succumbed to bowel cancer. But she had saved diligently during her final years so that after she passed away, Jill could attend boarding school.

Jill remains deeply grateful for her short time with her mother and credits Margaret for her strong sense of social justice. She cites Margaret's altruism, forward-thinking and big heart as hugely influential to who she is today.

That's why Jill is leaving a gift in her Will to Barnardos, so that a child has the opportunity "to be loved and accepted as part of a family" as she was able to experience with Margaret.

Jill's big heart will keep her mother's legacy alive and bring hope to a new generation.

Because Big Hearts Keep Going Forever

At Barnardos we believe that big hearts are beautiful. And it's your big heart that will keep a generation of children safe and protected. When you leave a heartfelt legacy in your Will, you'll make a significant impact on the lives of Australia's most vulnerable children.

By advising us of your gift, you will join Barnardos' Big Hearts – a dedicated group of supporters who share a deep concern for the safety of children.

When we put our hearts together, we can keep children safe.



We're here to help

If you're considering leaving a gift in your Will to Barnardos, we can help answer any questions you may have.

Please contact our Bequests Manager on 02 9218 2475 or email bequests@barnardos.org.au

About you

15. To help us understand you better, do you have? (Please tick all that apply)

- Children
- Nieces or nephews
- Grandchildren
- I don't have children

16. In which age groups are your children/grandchildren/nieces/nephews? (Please tick all that apply)

- Younger than school age
- Primary school
- High school
- Adult

17. Which of the following best describes your relationship status?

- In a relationship
- Single
- Married or de facto
- Widow/Widower
- Other/Prefer not to say

18. Your feedback is important and helps us understand how to best serve you—is there anything that you'd like to let us know about?

Your contact details

<Date>
<Donor_ID> <Appeal_ID> <Package_ID>
<Address>
<Address 2>
<Address 3>
<Suburb> <State> <Postcode>
<URN>

We're sorry if your details are not correct. We would appreciate it if you can update them below.

Thank you.

Your reply will be kept in the strictest confidence.



Barnardos Australia
GPO Box 9996 Sydney NSW 2001
(02) 9218 2300
barnardos.org.au

Barnardos Australia values your privacy. Barnardos Australia never intends to ask for more assistance than you are able to give, so please contact us if you would prefer not to receive future appeal mailings. Your personal information will be collected, used and disclosed in accordance with our Privacy Policy - barnardos.org.au/privacy-policy. ABN 18 068 55 7906

MAILING HOUSE
BAR CODE PLACEMENT



Barnardos
Supporter Survey 2021

Dear <Salutation>

Thank you so much for your support of Barnardos Australia, and being a champion for Australia's vulnerable children. We are incredibly grateful for your generosity.

As a valued member of our community, we'd like to know more about why you choose to support Barnardos, so we can better serve you.

I'd be grateful if you could complete this survey, and return it to us in the reply paid envelope provided. All replies will be kept strictly confidential, and will help us to communicate better with you about the issues you care about the most.

Thank you once again. We really appreciate your feedback and ongoing support.

<signature>

Deirdre Cheers
CEO, Barnardos Australia

What matters to you

1. As one of our long-term supporters, what are your top two reasons for supporting our work? (Please number your two choices below)

- I support Barnardos because I believe that their values are ones I share
- I believe every child deserves to grow up safely
- I want to provide Australian children a secure family environment just like I had
- I support Barnardos because they provide immediate help
- I support Barnardos because they have demonstrated their impact
- I support Barnardos because I can't stand any child suffering
- I have a personal connection with Barnardos
- Other (please state)

Continued overleaf..

MAILING HOUSE
BAR CODE PLACEMENT

Jill's
Big Heart
will never give up



Jill Coggan doesn't know where she'd be today without her adoptive mother's big heart. At 76, she is proud to share her love with the next generation.

Jill's mother Margaret was a single woman in her 40s, a well-loved and respected member of the community who volunteered during the war with Dr. Barnardos services in England.

Jill always felt loved and valued in their small family, even as a child. "There was no way that anything could ever harm me with Mum around," she says.

Tragically, when Jill was just eleven years old, Margaret died from bowel cancer.

Jill remains deeply grateful for her short time with her mother. She cites Margaret's altruism, sense of social justice and big heart as hugely influential to who she is today.

That's why Jill is leaving a gift in her Will to Barnardos, so that a child has the opportunity "to be loved and accepted as part of a family", as she was able to experience with Margaret. Jill's big heart will keep her mother's legacy alive and bring hope to a new generation.



To learn more about becoming a Barnardos Big Heart, please contact:

Bequests Manager
(02) 9218 2475
bequests@barnardos.org.au



Do you know how your Big Heart can help protect vulnerable children?



4

Barnardos Australia.

“Barnardos Big Hearts: Your Big Heart can change a child’s life.” — Kingsley Edwards

Is it worth creating a bespoke GIW programme?

‘Yes!!’

FIA

CONFERENCE

4

Barnardos Australia.

“Barnardos Big Hearts: Your Big Heart can change a child’s life.” — Kingsley Edwards

Is it worth creating a bespoke GIW programme?

Benefits of creating a bespoke GIW programme:

- Formed a foundation from which it could build and develop;
- Culturally, it helped having something bespoke so that others internally could reference;
- It becomes like ‘a face-to-face’ pitch card and works to open doors, start conversations;
- Vital to have and use to engage warm supporters; and
- It helps with other DM/ EDM activity by framing the GIW proposition and it’s related ‘ask’

4

Barnardos Australia.

“Barnardos Big Hearts: Your Big Heart can change a child’s life.” — Kingsley Edwards

Is it worth creating a bespoke GIW programme?

In the past 2.5 years...

Bequest pipeline has grown by 123%

In the first year of use, there was a 59% increase in confirmed bequestors.

Actual confirmed bequestors has grown 105%

4

Barnardos Australia.

“Barnardos Big Hearts: Your Big Heart can change a child’s life.” — Kingsley Edwards

Kingsley’s Top Tip?

‘..it’s always about what kind of world do you want to leave?’

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5

WWF Australia.

At launch:

'Forever People.'

*At refresh: 'The world you have to give,
is a world filled with beauty.'*

FIA

CONFERENCE

5

WWF Australia.

'Forever People/ "The world you have to give..." — Christine Robinson



FIA

CONFERENCE



**WHEN DID YOU
FALL IN LOVE WITH NATURE?**

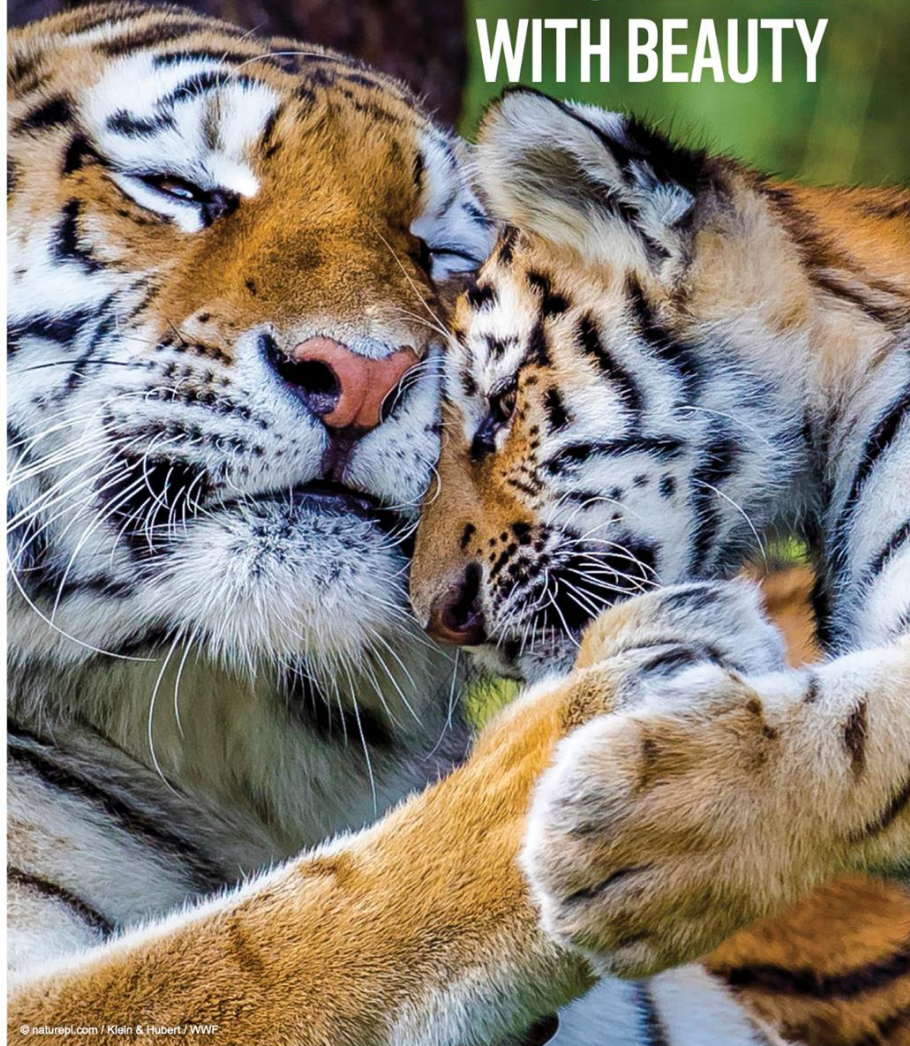
IS TODAY THE DAY YOU PROTECT IT FOREVER?



WWF

AUSTRALIA

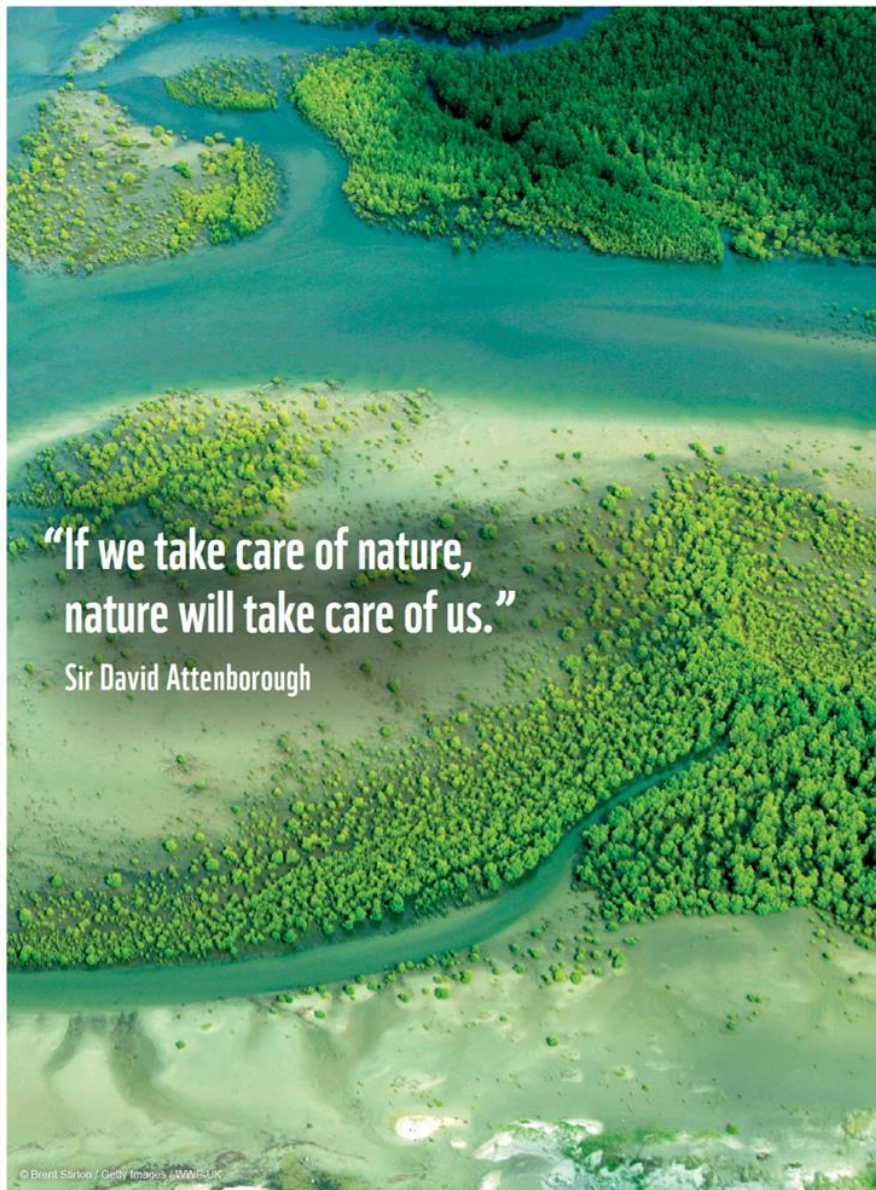
THE WORLD YOU
HAVE TO GIVE IS
A WORLD FILLED
WITH BEAUTY



© naturepl.com / Klein & Hubert / WWF

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**“If we take care of nature,
nature will take care of us.”**

Sir David Attenborough

© Brent Stirton / Getty Images / WWF-UK

FOR NATURE, FOREVER

Thank you for considering leaving a gift in your Will

Throughout this booklet you'll learn more about the dedicated defenders of our wild places and species. Whether to plant and protect native habitat, or restore global tiger numbers—your decision to join these defenders is more important than ever before.

The beauty of our bushlands, forests and oceans, and the precious animals that rely on these unique landscapes need support to survive. Put simply, global conservation efforts rely on the support of dedicated people like you.

Every gift helps fund projects that protect animals, habitats, and humanity across the globe.

However, it is the most remarkable gift of all—a gift in your Will—that opens new doors. Every gift from a Will helps us respond faster to crises, commit to long-term projects, and expand our capacity to meet the challenges the planet faces.

The changes you wish to see are only achievable when we stand together to

protect the natural world we love. And including WWF-Australia in your Will is the most significant way you can ensure long-term programs in Australia, and worldwide, can continue.

**“After I moved to Australia
I soon became concerned
about the plight of much of
the country’s wildlife. 60
years later I’m still a WWF
supporter and continuing my
legacy to nature with a gift in
my Will.”**

David Waterhouse



© Shutterstock / Seb c est bien / WWF

OUR CONNECTION TO NATURE IS A GIFT

Our earliest memories are filled with nature; from exploring the bush or rainforest, playing at the beach, or being awed by animals in our own backyards. The love you have for nature is what drives you to protect it.

Across the globe, our natural world is facing unprecedented challenges. You've lived through bushfires, deforestation and extreme weather events. You've felt the fear when wondering what kind of world future generations will experience, and which wonders may be lost forever.

Only together can we save what we love.

A gift in your Will is much more than a donation. It is a statement of your belief in a future where humans live in harmony with nature—where we can create everlasting havens for wildlife, and a healthy planet for people.

When you make a gift in your Will to WWF, you're acting on your true and deep love of nature. By making a gift in your Will, you are offering new opportunities: to halt extinction, meet climate challenges,

and better protect the natural world you know and love.

At this critical moment for our environment, a legacy of protection, preservation and care for the natural world can be your gift to nature and to the future. You can protect more than humanity. You can protect wildlife on the brink of being lost forever.

The places you love, their wonder and their majesty must be protected. And they can be, with your help.

NICK'S WISH FOR THE FUTURE



NICK HEATH WITH HIS FAMILY

“While I have seen many wins over the years, I have also come to realise that my lifetime will not be enough. The natural places we love will always be prey to exploitation.”

Nick Heath



© WWF-Aust / Troy Morgan. Above: © Creativity of Nick Heath

Nick's connection to the Great Barrier Reef was formed at a very early age. His dad was a dive boat captain, and Nick spent his childhood in the reefs and coral islands between Mackay and Cooktown. Exploring the wonder of one of the world's most diverse and precious environments, Nick was horrified to return home years later and see the destruction of this precious site. The Reef was, in his words, 'turning to rubble.'

Observing the once rainbow-coloured corals turned brown and white as they decayed—Nick vowed to devote his working life to conserving what was left. He joined the WWF team to protect the Reef from pollution, overfishing and other human impacts.

“While I have seen many wins over the years I have also come to realise that my

lifetime will not be enough. The natural places we love will always be prey to exploitation.

“I chose to leave a gift in my Will to WWF to fight for the Great Barrier Reef when I am no longer around to fight for it myself.

“As the father of two young children, the protection of our natural world is more important to me than ever before.”

“Through my gift to WWF I can give my children the greatest gift of all—the hope of clean air, fresh water and a healthy planet.”



© WWF-Aust / Christina Ford

“I have supported WWF-Australia for the past 30 years. In doing so, I am not a voice alone in the wilderness. This organisation, held in high esteem globally, has and will make the difference that is required, for ourselves and future generations.”

Marléne Verbeek, who left a gift in her Will

A MISSION BORN OF LOVE MUST BE SUSTAINED BY LOVE

You've already shown that you are dedicated to preserving our wildlife and wild spaces. Today is the time to act and protect what you love.

01

SPEAK TO YOUR FAMILY AND LOVED ONES

Making or updating your Will is an incredibly personal and significant decision. Consider your family and friends. Reflect on leaving a gift to WWF—even a gift of 1% of your estate will help to protect the animals you care about—and discuss your decision with your loved ones, sharing your vision for the future with them.

02

DECIDE WHAT KIND OF GIFT TO LEAVE

A residual bequest has the greatest impact in the future. You can make a gift of the residue (remainder) of your estate, or a share of the residue, once other specific gifts and expenses have been taken care of. You can also choose to leave a percentage share of your estate or a specific bequest in your Will.

03

ENLIST THE HELP OF A PROFESSIONAL

Your Will is an important legal document, and should be worded correctly to ensure your wishes are carried out. A solicitor or public trustee can help you with this process. You may also wish to consider creating a free legal Will online. Visit our partners at gatheredhere.com.au/wwf to see if this option is right for you.

04

CREATE YOUR LEGACY FOR NATURE

To include a gift to WWF-Australia, all you need is our ABN 57 001 594 074 and registered name—World Wide Fund for Nature Australia. You may wish to use our recommended wording: I give to World Wide Fund for Nature Australia (ABN 57 001 594 074) free of all taxes and other deductions (the residue of my estate / a ___% share of my estate / the sum of \$ ___) for its general purposes, and the receipt given on behalf of the World Wide Fund for Nature Australia shall be sufficient discharge to my trustee.

If you have any questions or wish to discuss your legacy please contact our Gifts in Wills team on 1800 032 551, or email giftsinwills@wwf.org.au



WWF

AUSTRALIA



NATURE. LIFE. LOVE.
THIS IS THE WORLD YOU HAVE TO GIVE.

©Leah-Anne Thompson / stock.adobe.com

**CONTACT WWF-AUSTRALIA TODAY TO FIND OUT HOW A GIFT IN
YOUR WILL CAN BE YOUR LASTING LEGACY TO THE WORLD YOU LOVE.**

WWF.ORG.AU/LEGACY | 1800 032 551 | GIFTSINWILLS@WWF.ORG.AU

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2

WWF Australia.

'Forever People/ "The world you have to give." — Christine Robinson

Is it worth creating a bespoke GIW programme?

'Always.'

FIA

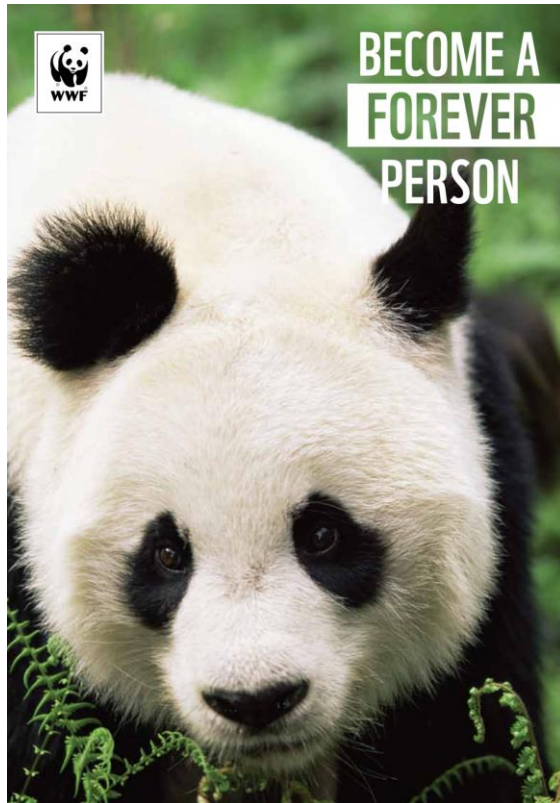
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5

WWF Australia.

'Forever People/ "The world you have to give." — Christine Robinson

Is it worth creating a bespoke GIW programme?



ROBYN & RON BRESSINGTON

"We have long held a deep love and concern for the preservation of endangered species. Leaving a Bequest is the best way that we can give something back to the world that has given us so much pleasure and so many wonderful experiences.

Our Bequest will help to ensure that other people will be able to observe nature in its home of rich diversity. WWF looks at things proactively, with a global perspective – they know where help is most needed."

Robyn and her husband Ron's seven-week trip to the orang-utan forests of the Heart of Borneo reaffirmed their decision to protect precious places and animals for future generations through their Will.

Forever People - protecting the heart of Borneo, the only place on Earth where orang-utans, pygmy elephants, rhinos and clouded leopards share the forest.

5

WWF Australia.

'Forever People/ "The world you have to give." — Christine Robinson

Is it worth creating a bespoke GIW programme?



ANN WALLACE

"I have been a WWF supporter for many years and I support where I can – and I congratulate WWF on its efforts and achievements."

As small children, Ann Wallace's mother and a boy called Peter Scott shared a deep love of nature. Sometimes in their efforts to prevent cruelty and suffering, they would search together in the fields and lanes around their home in southern England and, using sticks, would dislodge traps set by the local farmers.

Here in Australia, Ann recalls her mother telling of this friendship with the boy who went on to become Sir Peter Scott, founder of WWF globally. Ann is continuing her mother's lifelong love of nature by making a Bequest to WWF in her Will.



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MARLÈNE VERBEEK

"Over 30 years ago, I started supporting WWF to aid them to police, protect and safeguard all animal life, their habitats, food and shelter sources."

When I am gone, my Bequest will continue to support WWF's important pursuit, and my passion for all animal life.

In doing so, I am not a voice alone in the wilderness. An organisation of this clout, held in high esteem globally, has made and will make the difference that is required, for ourselves and future generations."

Growing up in South Africa, Marlène grieved at the destructive impact of humanity in our natural world. Marlène's gift to WWF in her Will, will ensure the ongoing protection of some of the world's most threatened species.

NATURE. LIFE. LOVE.
THIS IS THE WORLD YOU HAVE TO GIVE.

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2013: Tribe-based



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2021: 'Love'-based

5

WWF Australia.

'Forever People/ "The world you have to give." — Christine Robinson

Is it worth creating a bespoke GIW programme?

'Forever PEOPLE/ "The world you have to give."

7 year average:	2013	2023
	\$1,180,000/ pa	\$5,000,000/ pa
Confirmed bequestors	428	2,249
Average bequest	-	\$90,000

5

WWF Australia.

'Forever People/ "The world you have to give." — Christine Robinson

Is it worth creating a bespoke GIW programme?

Also of note:

- Criticality of WWF brand—huge responsibility, enormous trust-quotient.
- Comparative advantage by having a bespoke GIW prop.
- Ease with which you can engage interest via offline, before advancing the relationship F2F.
- Need for GIW to grow and change with changing audience interests (and media ie. bushfires).

Introducing,
Cherie Hansell

*Membership & Fundraising Director,
The Wilderness Society*



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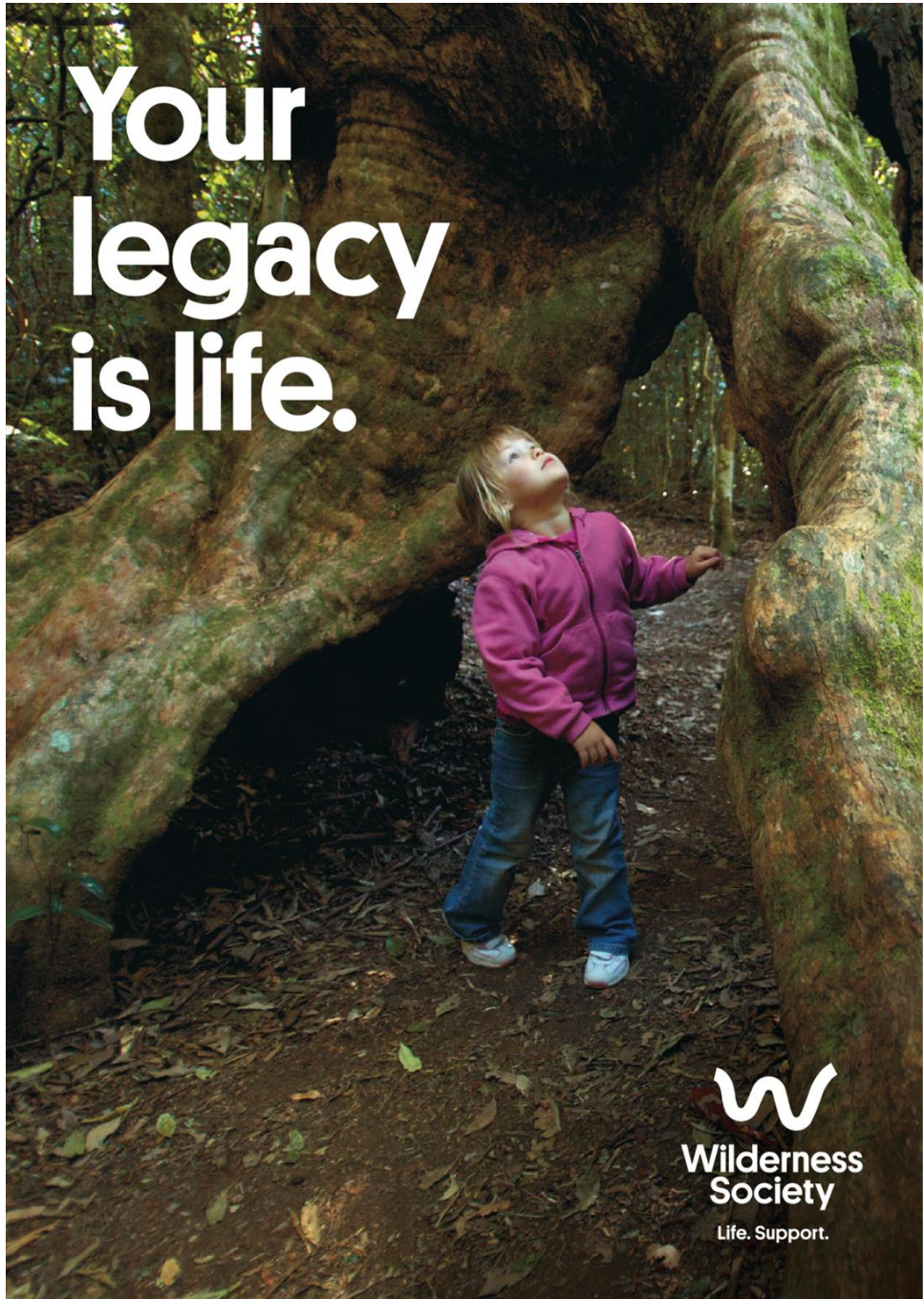
The Wilderness Society

Forever Wild/ “Your legacy is life.”

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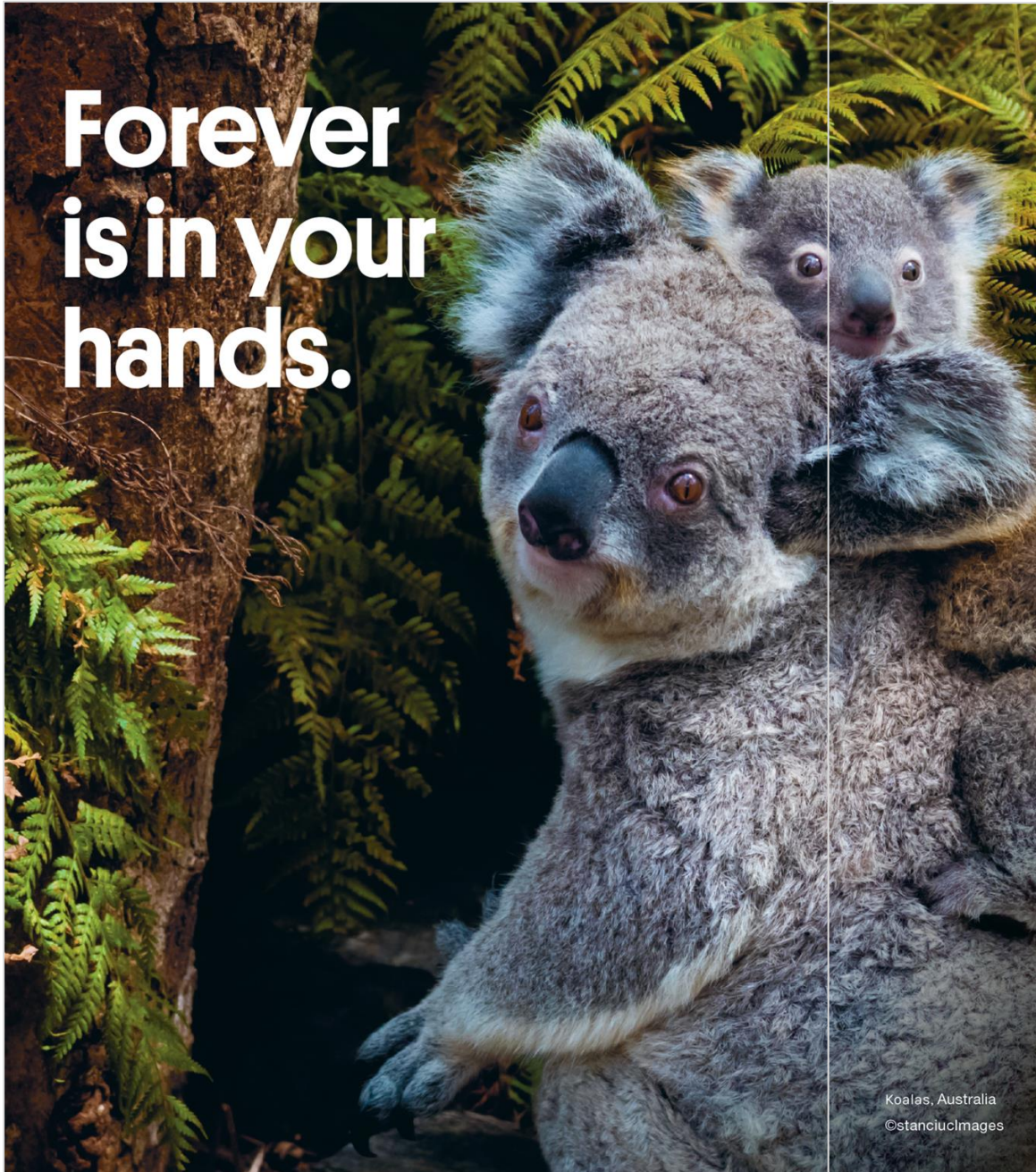
Your
legacy
is life.



CONFERENCE



Forever is in your hands.



Koalas, Australia
©stanciulimages

As National Campaigns Director of the Wilderness Society, I've seen firsthand how crucial Gifts in Wills are to achieving certainty and security for our forests, oceans and wildlife. Some of our most significant wins have taken a long time to achieve. It took years to stop a dam on Tasmania's Franklin River, and for Ningaloo Reef to be declared a World Heritage area.

The Summer 2020 bushfire season has changed us. It has had a profound impact on our lives and livelihoods – and on nature. It's almost unbearable to think of the vast tracts of forest destroyed and the deaths of billions of native animals but together, we must face this devastation, and commit ourselves to protecting the majesty of our living world.

But there's still so much to be done across this great continent to create a real future for our diverse landscapes and the species that call them home. By leaving a gift in your Will, you can ensure that funding is secure to fight for cleaner air, abundant wildlife, resilient forests, and a stable climate. A future that's better for all life on Earth.

On behalf of the Wilderness Society, thank you so much for considering making a difference to nature by remembering wilderness in your Will.

For the wild,

Amelia Young
National Campaigns Director
The Wilderness Society



A plan for forever.

For over 40 years, the Wilderness Society has been at the heart of Australia's conservation movement. Our current plan will protect our wilderness from destruction forever.

As the threats to our environment continue, our campaigns will take a multipronged approach to defending and preserving our wilderness.

Today, we're in a race against the clock to secure better laws and oversight for the ecosystems that sustain us, and meaningful protections for Australia's most important wild places. We're changing the conversation about nature, and building a sophisticated community movement putting the power back in the hands of everyday people.

Australia's wildlife continues to be devastated by deforestation, industrialisation and urbanisation. Your legacy can help protect our irreplaceable native habitats and beautiful wilderness forever.

This is the opportunity to pass on your own cherished values to the next generation and preserve the wonder of nature for all those who come after you.



A legacy of protection.

1981

Franklin River

Our passionate campaign resulted in Tasmania's Franklin-Gordon Wild Rivers National Park followed by the 1983 high court decision to save the Franklin River.

2012

Tasmania

We negotiated protection for over 500,000 hectares of native Tasmanian forest.

1992

Fraser Island

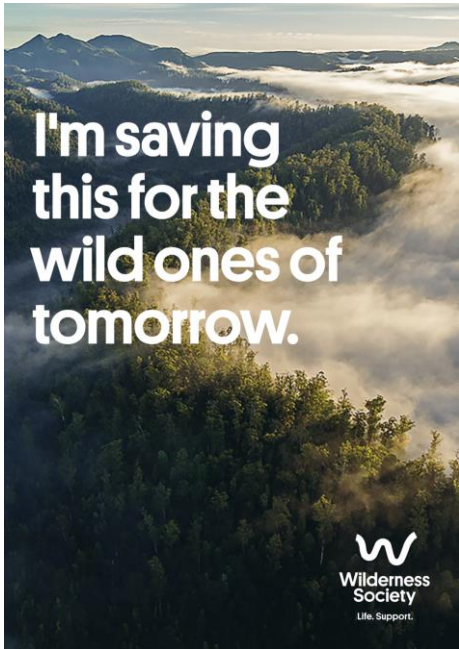
We helped stop the logging and the island was declared a World Heritage area.

2013

The Kimberley

We helped protect the biodiversity and culture of the Kimberley from a gas export megahub.

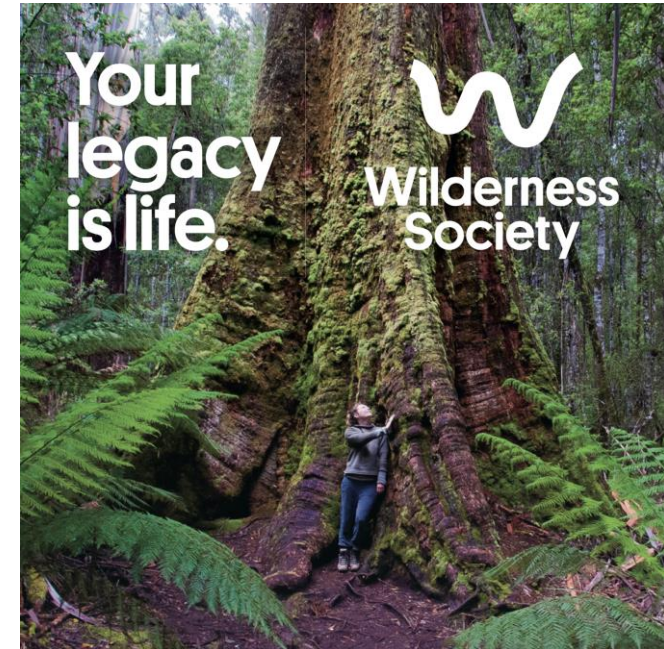




GIW promise card



GIW sticker



GIW magnet

6

The Wilderness Society.

'Forever Wild/ "Your legacy is life." — **Cherie Hansell**

'The Wilderness Society has a really solid bequest programme and I've been lucky enough to be involved in it for the past 12 years...'

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The Wilderness Society.

'Forever Wild/ "Your legacy is life." — **Cherie Hansell**

As a grassroots organisation who started during the Franklin campaign—we love hearing stories from our long-term supporters who were involved during these significant campaigns...

(these are also our identified bequest prospects)

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'Forever Wild/ "Your legacy is life." — **Cherie Hansell**

Today, we have:

- *3,000 confirmed bequestors*
- *1,500 intended*
- *And over 5,000 identified/ interested bequest prospects...*

6

The Wilderness Society.

'Forever Wild/ "Your legacy is life." — Cherie Hansell

Developing the Bequest Pipeline

1 Identify 2 Engage 3 Ask 4 Recognise 5 Steward

Then most importantly...

6 ...and Ask again

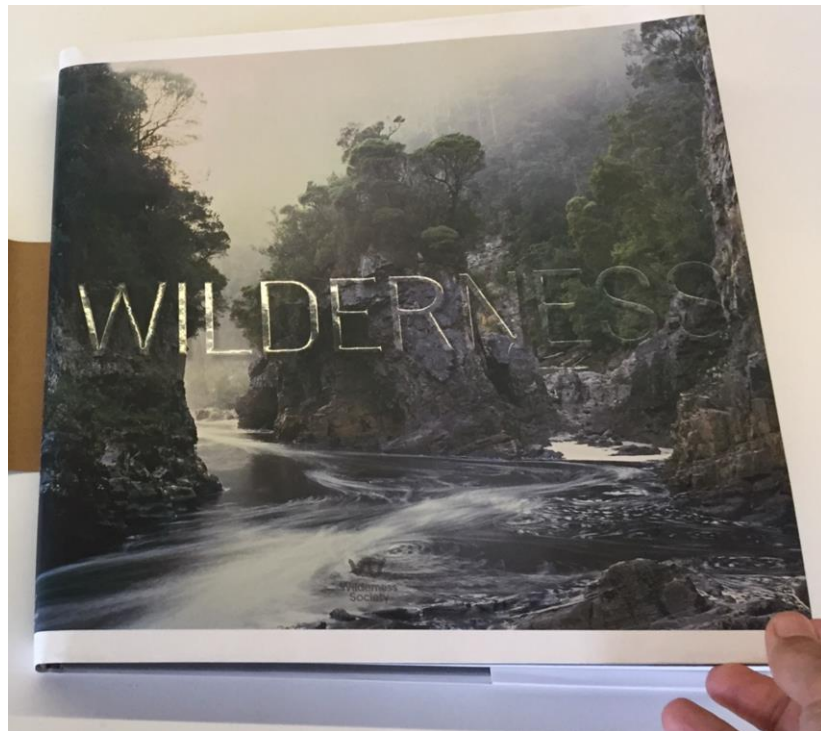
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The Wilderness Society.

'Forever Wild/ "Your legacy is life." — Cherie Hansell

Developing the Bequest Pipeline:

Identify, Engage, Ask, Recognise, Steward then ask again....



6

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Developing the Bequest Pipeline:

Identify, Engage, Ask, Recognise, Steward then ask again....



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The Wilderness Society.

'Forever Wild/ "Your legacy is life." — **Cherie Hansell**

By the numbers...

'Forever Wild/ "Your legacy is life."		
	2003-2013	2014-2023
10 year average:	\$200,000/ pa	\$2,000,000/ pa
Confirmed bequestors	1,000	3,000
Average bequest	\$30,000	\$80,000

“An effective donor experience involves revealing the compelling victory that a supporter can achieve through the act of giving. For the victory to be appealing, the donor must be able to see how their identity is enhanced by working towards that victory.”

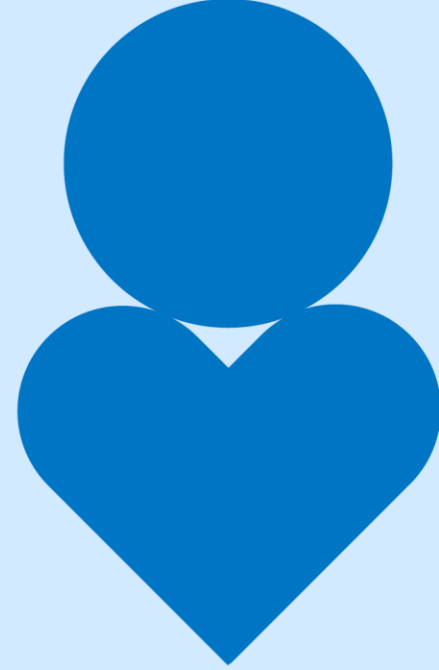
Russell James

Professor of Charitable Financial Planning



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**FIA
Conference**
2024



Thank you



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