



How your Bequest can help preserve the Balcombe Estuary Reserves



Caring for the Balcombe Estuary Reserves

Leaving a gift to BERG Mt Martha in your will can help ensure that the natural beauty of the Balcombe Estuary and its reserves is maintained into the future.

In making a bequest to BERG Mt Martha, you will be recognising the value of our work and supporting that work to continue beyond your lifetime.

Your choice of bequest

A bequest does not have to be large. Financial gifts of all sizes make a significant difference to our important conservation work. There are many ways of tailoring a bequest to suit your personal preferences and circumstances. The most common types of bequest are:

Residual bequest

You can provide for your family and friends first and leave what is left (the residue) to BERG Mt Martha. If your estate increases in value, so does your bequest. A residual bequest helps offset the effect of inflation. BERG Mt Martha can receive all forms of property and shares, and can be the beneficiary of a life insurance policy.

Percentage or nominated portion of estate

Your estate could be divided proportionally among a number of people and/or organisations. You won't have to remake your will to compensate for changes in value over time.



Life interest

Establishing a life interest in your will allows a spouse or nominated person to use your property and to receive all of the income derived from your estate during their lifetime. The capital can then be passed on to BERG Mt Martha.

Cash sum

A specific cash sum is a common form of bequest but, because it doesn't allow for changes in the value of your estate, it may need to be renewed periodically.



Codicil

You can amend your existing will to include a bequest to BERG Mt Martha by preparing a signed and witnessed *codicil* (an additional page to your will). You should seek professional legal advice when preparing a codicil to ensure it does not contradict anything already in your will and is legally binding. For substantial amendments, it is recommended that you make a new will.

So what do I do if I decide to include BERG Mt Martha in my will?

If you decide to leave a bequest to BERG Mt Martha, a clause can be inserted in your will using the following words:

I give:

- a. *the residue (or percentage of the residue) of my estate; or*
- b. *the sum of \$ (amount)*

to Balcombe Estuary Reserves Group Mt Martha Inc (ABN 50 224 628 623) to be held upon Trust and to be applied towards conservation purposes in accordance with the constitutional objectives of Balcombe Estuary Reserves Group Mt Martha Inc in its absolute discretion to determine.



BERG Mt Martha legal and tax status

BERG Mt Martha is an Incorporated Association registered in Victoria. It is registered with the Australian Charities and Not-for-Profits Commission and has been endorsed as a Deductible Gift Recipient and Tax Concession Charity by the Australian Taxation Office.

Property or shares gifted through a will to BERG Mt Martha would not attract capital gains tax either for the estate or for BERG Mt Martha when they are sold.



Notification of your intentions

When you make a will which includes a bequest to BERG Mt Martha, it is a good idea to let your loved ones know that it is important to you to contribute to this work.

Let us know

While you are under no obligation to disclose the contents of your will to anyone, if you do decide to include BERG Mt Martha in your will we would love to hear from you. Knowing your intentions will enable us to thank you for this generous gesture during your lifetime, as well as to keep you updated about our work and future plans. While we would very much like to acknowledge your bequest, your wishes for privacy in this matter will be respected.



For a confidential discussion about making a bequest to BERG Mt Martha, please contact us on **0447 160 288** or email **info@berg.org.au**

Alternatively, you may prefer to use the form below.

To the Secretary, BERG Mt Martha

Private and Confidential

- I have included a bequest to BERG Mt Martha in my will.
- Please contact me to discuss how I can help BERG Mt Martha by including a gift to BERG Mt Martha in my will.

Name:

Address:

Phone:

Email:

BERG Mt Martha
PO Box 433
MT MARTHA VIC 3934 info@berg.org.au 0447 160 288