

## Guide for Preparing to Make a Will

### Step 1

List the relevant information regarding your assets.

- Real Estate
  - Your own home
  - Investment property
- Bank or Building Society Accounts
- Life Insurance policies
- Shares, bonds or debentures
- Superannuation or retirement funds
- Pension
- Car(s), boats or caravans
- Furniture, appliances such as televisions stereos
- Specific items such as cameras
- Jewellery
- Antiques, works of art
- Collectables (stamps, coins, miniatures)
- Other

### Step 2

Write down the names, addresses, and contact numbers for your intended beneficiaries.

- Next of kin
- Close friends
- Clubs and organisations of which you are a member
- Preferred charities

### Step 3

Decide on the break up of your assets. After providing for your family, friends and loved ones, you may choose to leave:

- The remainder (residue) of your estate to Blue Care or your chosen charity
- A specific sum
- All or part of a particular asset or share portfolio
- The whole of your estate

### Step 4

The correct wording for a bequest to Blue Care is:

**“I bequeath... (description)... to the Uniting Church in Australia Property Trust (Q.) for the general purposes of BLUE CARE, (Centre/Facility), PO Box 1638, Milton BC, Qld 4064, and declare that the signature of the Secretary for the time being, of the said Trust, to be sufficient discharge for my trustees.”**

### Step 5

**Have you considered...?**

#### ***What is an enduring power of attorney?***

An enduring power of attorney is a legal agreement giving someone else the power to make decisions on your behalf. It allows you to give that person the power to make personal decisions, as well as, or instead of, financial decisions. ‘Enduring’ simply means that the power continues even if you lose the capacity to make decisions for yourself.

#### ***Exactly what is an Advance Health Directive?***

An Advance Health Directive is a document in which you give general instructions about your future health care. It comes into effect only if you are unable to make your own decisions.

Contact a solicitor or trustee company to arrange for them to prepare your Will. If you need assistance finding one please contact our Planned Giving Officer.

#### **Contact us at:**

Blue Care  
Marketing and Communications  
on (07) 3377 3395  
Email: [marketing@bluecare.org.au](mailto:marketing@bluecare.org.au)  
Or visit our website: [www.bluecare.org.au](http://www.bluecare.org.au)  
for information on services available.