

A guide to making or updating a Will

Blue Care is uniquely positioned as one of Australia's leading residential aged care, community care and retirement living providers. Leaving a bequest to Blue Care is one of the ways you can help us continue our capital works program, to rebuild and renovate our aged care facilities to reflect the needs and choices of the people we care for.

Step 1:

List the relevant information regarding your assets:

- Real Estate (Your own home / Investment property)
- Bank Accounts
- Life Insurance policies
- Shares, bonds or debentures
- Superannuation or retirement funds
- Pension
- Car(s), boats or caravans
- Furniture, appliances such as televisions
- 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 to the Uniting Church in Australia Property Trust (Q.)... the rest and residual of my Estate OR ___% of my Estate OR ___% of my the residue of my Estate OR the sum of \$_____ for the general purposes of BLUE CARE,..(Centre/Facility).., GPO Box 1269, Brisbane QLD 4001, and declare that the signature of the Secretary for the time being, of the said Trust, to be sufficient discharge for my trustees."

You can include a declaration in your Will that discourages your wishes being contended.

As your circumstances change, the Public Trustee recommends that you check and update your Will every few years.

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.

Blue Care Legacy Charter

Including Blue Care in your Will is a big decision to make. We want you to feel completely comfortable considering this decision. The following is our commitment to you:

- 1. Blue Care realises that your family and loved ones will come first*
- 2. Blue Care respects your privacy and recognises and appreciates your Will is completely personal to you*
- 3. We recognise it is your decision and you need to make it in your own time*
- 4. You can tell us you have left a gift if you want to but you don't need to tell us*
- 5. We encourage anyone making a bequest to seek independent legal advice*
- 6. We encourage speaking to family and friends to make the intention of a bequest known*
- 7. We will use your gift carefully and cost effectively*
- 8. We accept that at any time in the future, you have the absolute right to change your mind about a gift in your Will*
- 9. We will handle any gift your leave us in accordance with your wishes, and also with care, sensitivity and respect.*

1300 BlueCare
1300 258 322
www.bluecare.org.au