

# For your solicitor



Your client has approached you regarding including a bequest to Trinity Families in their will. We have recommended that they talk to you to discuss the various ways of making this bequest and to ensure that correct wording is used so that their intentions are clear.

Trinity Families is the trading name of the public ancillary fund known as Roman Catholic Diocese of Sale Charitable Fund. It is endorsed by the Australian Tax Office as a deductible gift recipient and is registered as a charity with the Australian Charities and Not-for-profit Commission. Our charter allows us to disperse funds to other registered charities with DGR status to run programs benefitting families in the Greater Gippsland area, covered by the municipalities of Casey, Cardinia, Baw Baw, Latrobe, Wellington, East Gippsland, South Gippsland and Bass Coast.

All gifts of \$2 or more are tax deductible.

In preparing a bequest we suggest the following wording:

*"I bequeath, free of all debts and all duties and taxes [insert details of the bequest] to Trinity Families (ABN 85 334 135 693), or its successors, for its principal purposes. I declare that the written receipt of an authorised officer of Trinity Families may be accepted by my Executors as a full and complete discharge of this bequest."*

We also recommend that the bequest should be unencumbered, particularly if it involves land or share parcels.

## **Tell us**

If your client decides to include Trinity Families in their will, we recommend that they, or you as their legal representatives, speak confidentially to the executive officer to outline the bequest, as it is important we clearly understand the intentions, and whether following death, they would want their generosity publicly acknowledged or to remain private and confidential.

## **Further information**

For further information please contact Executive Officer Colin Coomber on **(03) 5622 6688** or email [trinity@sale.catholic.org.au](mailto:trinity@sale.catholic.org.au)

**Executive Officer  
Trinity Families  
PO Box 1410  
WARRAGUL VIC 3820**

[www.trinityfamilies.org.au](http://www.trinityfamilies.org.au)