



# Gifts in Wills (Bequests)

A/4.1.1.7

## An enduring legacy

The Uniting Church in Queensland is fortunate to receive bequest funds across their agencies and congregations. Making a bequest or planned gift, through your will is a powerful way of creating an enduring legacy for future generations. It also enables you to make the kind of gift you may not be able to make in your lifetime. For some general information about wills, please refer to this guide: [making a will](#). Alternately you can contact the Public Trustee on 1300 360 044 or at [www.pt.qld.gov.au](http://www.pt.qld.gov.au) to obtain a copy of this guide.

## Bequest

A bequest is a gift specified in your Will. It is an instruction contained within a Will and specifically reserves part or all of an estate to a particular beneficiary, whether the beneficiary is a person or an organisation. It is a thoughtful and enduring way of showing others what you value most. When you make a bequest, you are planting a special gift in your will that changes lives. Anyone can make a bequest—in any amount—to an individual or charity. Bequests can be simple or complex, with conditions about how the gifts can be used.

## The Beneficiary

In all cases, the appropriate beneficiary to be named in your Will is 'The Uniting Church in Australia Property Trust (Q.)' ("Property Trust"). This Trust, which was created by an Act of Parliament, has the responsibility to direct all benefits in strict accordance with the terms of your Will. As the legal entity, each gift is bequeathed to the Property Trust which is administered by the Synod Records Registrar and the Finance Team.

## Ways to give through your will or trust

There are a variety of ways to make a charitable donation through your will, including:

**1. You can give a part of your estate or the residue of your estate.**

If the value of your estate grows, or is eroded by inflation or other circumstances, your family and any other beneficiaries will not be disadvantaged.

**2. You can give a specific amount of money.**

This does not allow for a change in your circumstances or for inflation, which will tend to erode the value of a specific amount.

**3. You can give a particular item or items**

These can include shares, works of art, property, jewellery or other items of value.

## What kind of bequest?

In relation to planning, it is important to seek guidance and direction in prayer. If you decide to leave a bequest to the Property Trust, it is important that your will is clear and concise, to ensure that your original intentions are followed. However, we are happy to consult with you or your adviser on wording or details.

For more information on suggested wording for gifts in Wills or bequests to the Property Trust, please contact us by email at [missionpossible@ucaqld.com.au](mailto:missionpossible@ucaqld.com.au) or call (07) 3377 9823. We do recommend that you **speak with your legal adviser** before making any decisions regarding the eventual distribution of your estate.

To ensure your Will is effective you should consult a solicitor or public trustee. You can find one by contacting the [Queensland Law Society](#) or [Public Trustee of Queensland](#).



## How we may use a bequest

The Queensland Synod missional impact envisions us working together as a wider Uniting Church community to make a sustainable difference. This involves the Synod office, congregations and presbyteries working in collaboration with our agencies and schools to enable the future of mission for the communities whom we serve. For more information explore the [presbytery mission program](#), as well as our [missional impact](#).

The Property Trust's preference is for bequests which do not restrict the use of assets or monies to provide the Property Trust with the flexibility to meet the church's greatest needs as they change over time.

## Administration of bequests

All bequest funds received by the Property Trust are administered by the Synod Records Registrar and the Finance Team. All monies are held in trust and accounted for in annual reporting. All monies are used only in accordance with the Uniting Church in Australia [Fundraising Policy](#), within the requirements of the applicable federal legislation, and are administered according to the relevant trust deed.

## Suggested wording for your will

If you decide to support the Property Trust through a bequest, the following are suggested forms of wording for inclusion in a will. We also recommend that you seek **independent legal advice** before relying on these suggested forms of words with respect to your intentions.

*Please note:*

*The Property Trust is not able to provide legal advice and the wording below is a suggestion only, and your member will need to discuss and finalise their intentions based on the advice of their solicitor. The wording in red relates to this particular gift and the wording in black is our general suggested wording for any bequest to a Uniting Church in Queensland.*

### Specific bequest

I GIVE, DEVISE AND BEQUEATH (insert type of gift and property location, etc.) to THE UNITING CHURCH IN AUSTRALIA PROPERTY TRUST (Q.) for the activities of <<name>> **Uniting Church** of the Uniting Church in Australia, Queensland Synod provided that should that church and/or its activities have ceased prior to my death or thereafter cease, the amount shall be used in such other manner as determined by the Queensland Synod.

### General bequest

I GIVE, DEVISE AND BEQUEATH (insert type of gift and property location, etc.) to THE UNITING CHURCH IN AUSTRALIA PROPERTY TRUST (Q.), the amount shall be used in such a manner as determined by the Queensland Synod.

## Recognising our bequest benefactors

It is helpful for us to know that the Property Trust is included as a beneficiary in your will. We understand that a will is a very personal and confidential document, and should you notify us of your intention to make a bequest your privacy will be respected.

Any notifications to us will be kept in the strictest confidence. Your personal information is confidential. For information about how we use and store your information, please obtain a copy of our [Privacy Policy](#). Some benefactors who intend to make a bequest to the Property Trust may allow us to recognise their generous gesture during their lifetime, while others may prefer to remain anonymous.



## Creating or amending your will

When considering a bequest, we advise you to discuss this with your family and seek **independent legal advice**. We can help you identify the purpose for your bequest and assist with the wording to ensure the Property Trust is able to fulfil your wishes. Once you have decided on the type of bequest you would like to make, ask your solicitor, legal adviser, or trustee to draft the appropriate clause. You may also find the guide [Plain English Legal Will Kit](#) helpful. Alternately you may contact Australian Seniors on 13 13 43 or at [www.seniors.com.au](http://www.seniors.com.au) to obtain a copy of this guide.

## Thanking you in your lifetime

Thank you for considering the Uniting Church in Australia in your will. Your commitment to the Church's mission through a legacy gift is something we treat with the deepest respect and gratitude. Please do inform us, so that the Uniting Church in Australia can show its appreciation during your lifetime.

## Revisions

Document number		A/4.1.1.7			
Version	Approval date	Approved by	Effective date	Policy owner	Policy contact
1.0	01.12.2020	Director, Church Enterprises	01.12.2020	ED Strategic Resources and Assurance	Business Development Unit
Next scheduled review		01.12.2025			