



THE ANGLICAN CHURCH OF AUSTRALIA

THE DIOCESE OF BUNBURY

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BEQUESTS

A bequest is a gift of property or money under the Last Will and Testament of a person after their death.

When someone is interested in making a bequest, they are encouraged to contact the Diocesan Office for advice. The Executors are asked to work with the Diocesan Office to ensure the bequest is held in the Diocesan Accounts in trust for the Parish and they can be released upon request and when the terms of the bequest are met. It is suggested the bequests indicate the purpose be for ecclesiastical purposes and can nominate either the Bunbury Diocesan Trustees or a parish as the beneficiary. If the bequest states a specific purpose, such as the upkeep of a bell, pews etc. then the bequest must be used for that purpose.

Potential donors are encouraged not to be too specific in their donation requirements as issues of planning, zoning, heritage listing and other matters may have an impact on the bequest and are circumstances that change over time and which cannot be planned for and can become difficult to fulfill over time.

Only the Executors of a bequest can vary the terms and complicated bequests need legal advice on any variation.

All legacies or bequests must be deposited through the Diocesan Office and are held in Term Deposit with either the Anglican Community Fund or a Bank.

Reports are sent to the parish on an annual basis in January detailing the bequests held by the Diocesan Office on behalf of the parish. The monies are invested and administered in terms of the particular trust / bequest. Interest is distributed to the parish as it is received.

Any legacies or bequests received directly by a parish must be notified to the Diocesan Trustees via the Diocesan Secretary.

Requests for funds from a bequest must be in line with the conditions of the bequest and accompanied by a Faculty, photos and costing details.



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Wording for A Form of Bequest (Also see below).

I give and bequeath to The Bunbury Diocesan Trustees whose receipts shall be valid and sufficient discharge of the same to be held in trust for or be applied for Ecclesiastical purposes in connection with the Anglican Church of Australia in the Diocese of Bunbury.

(If it is desired to make a specific bequest, instead the particular Diocesan Fund, or the name of the parish, as the case may be, for which the bequest is intended can be named. But if the Testator prefers to leave the appropriation of this bequest to the discretion of the Diocesan Trustees, instead of *“to be held in trust for”*, etc. the person may substitute the words:

“to be applied at the discretion of the said Trustees”,

or if the Testator prefers, the person may substitute the words:

“to be applied at the discretion of and subject to the direction of the Diocesan Council”.)

Cheques can be made payable to

Bunbury Diocesan Trustees OR

payments can be made by Electronic deposit to:

Bank Account – BDT OPERATING ACCOUNT

Account No. – 706 001 30004122

REF - Please include in the Reference your name and details of the mission.



THE ANGLICAN CHURCH OF AUSTRALIA
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BEQUEST TO THE ANGLICAN DIOCESE OF BUNBURY

I GIVE _____

*(Insert details of bequest, percentage of estate, sum of money or description of property.
Alternatively, if it is desired to make a specific bequest, insert instead the particular purpose for which the bequest is intended. See clauses below.)*

to The Bunbury Diocesan Trustees to be held in trust for or be applied for ecclesiastical purposes in connection with the Anglican Diocese of Bunbury.

In respect of this bequest I DECLARE as follows:

- i) A general charitable intent shall apply;
- ii) The bequest shall be paid to The Bunbury Diocesan Trustees for the Diocese of Bunbury for the purpose of this bequest;
- iii) If the purpose of the bequest no longer exists, the funds may be used for a similar purpose at the discretion of The Bunbury Diocesan Trustees;
- iv) The receipt of the Secretary or other proper officer of the Bunbury Diocesan Trustees shall constitute a full and sufficient discharge of my Trustee; and
- v) My Trustee shall not be obliged to see to or inquire into the application of money or assets the subject of such bequest.

Additional sample wording for Specific Requests:

- *Ecclesiastical purposes in connection with the Parish of (insert Parish name) in the Anglican Diocese of Bunbury.*
- *Purposes in connection with the work of (insert organisation or purpose) in the Anglican Diocese of Bunbury.*

Name: _____

Signed: _____

Witness: _____

Signed: _____

Date: _____