



Leaving a gift in **My Will**

Information Booklet



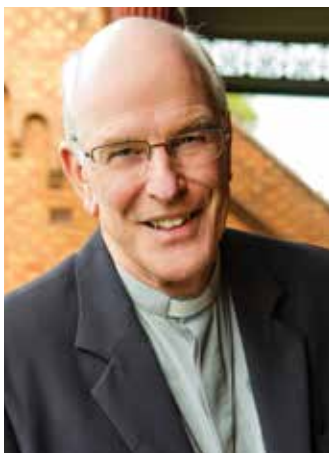
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## Welcome from **Bishop Bill Wright**

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+ *William Wright*

**Most Reverend William Wright,  
Bishop of Maitland-Newcastle**

Thank you for your past and continuing interest and support for the works and ministries of the Catholic Diocese of Maitland-Newcastle.

For over 150 years, the Catholic community has been an integral part of the story of the Hunter Manning and Lake Macquarie districts - from the beginnings of British settlement around Morpeth, Maitland and Newcastle. The presence of the early Catholic convicts drew the attention of the first priests to this district in the 1820's. Since then, through world wars and natural disasters, the industrial upheavals, the highs and lows of family births, deaths and marriages, the Catholic Church of Maitland-Newcastle (as it is now

known) has shared the life of and ministered to the needs of our broad and diverse faith community.

As Bishop of the Diocese it is my responsibility to ensure that, collectively, we are able to continue to meet the needs of the Catholic community and all those who turn to Catholic services, in the future, for help and support.

I invite you then to consider being part of that future by providing a Gift in your Will to either your Parish or the works of the Diocese. Your Gift will play an important

role in supporting the vital pastoral work of the Church in this Diocese to be there for your family and loved ones in the years ahead.

This guide describes the ways that you may help and how to make such a Gift. Your Bequest is a legacy of faith, a generous contribution and importantly a response to Christ's call for us to care for those around us who most need our help, not just today but into the future.

Thank you for your Gift and may God bless you for your generosity.

## Your Local Parish

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Many parishes would benefit from more resources to maintain their buildings and infrastructure as well as provide additional staffing, pastoral care services and liturgical support material.

A Bequest in support of your local parish would provide much needed help to your Parish Priest and the people of your local faith community. It would provide the Parish with funds to meet the needs of both its Church and buildings as well as the community it serves.



# Our Caring and Supportive Ministries

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## **Diocese of Maitland-Newcastle**

The Diocese of Maitland-Newcastle ministers to a broad cross section of our community and is responsive to an increasing array of pastoral needs.

A Bequest left to the Diocese of Maitland-Newcastle will ensure it has the resources necessary to meet the challenges it faces to continue to provide pastoral care and practical support to those in need.

## **The Bishops Pastoral Fund (BPF)**

You may choose to support the Bishops Pastoral Fund with your generous bequest. In so doing you will be supporting a number of ministries that provide wonderful pastoral services to people each year – comfort to those in crisis, despair or isolation; education to students in state schools, support for refugees; assistance for our indigenous communities; support for the sick, grieving and bereaved; adult faith education programs; and the education of seminarians.

“...you will be supporting a number of ministries that provide wonderful pastoral services to people each year...”



## Catholic Chaplaincy Services

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Chaplaincy is a specialised ministry undertaken by priests, deacons, religious or lay people. They are trained to provide care and support — personal, emotional, physical, relational and spiritual. They listen, providing a safe environment for people to share their concerns and feelings. They help people work through life's issues. They assist in times of crisis and difficulty. In short, wherever there is a need; there the Chaplain needs to be.

We refer to the outreach provided by Chaplains as Pastoral Care or Spiritual Care. Chaplains provide non-judgemental support to all, irrespective of their belief system, ethnicity or social position.

Chaplains are respectful of anyone they meet in the outreach they provide daily, no matter the meeting place. They provide a link between the church and the marketplace.

The Catholic Diocese of Maitland-Newcastle supports the following chaplaincies: Aged Care, Armed Forces, Hospitals, Industry, Port, Prisons and University.

“They assist in times of crisis and difficulty...  
wherever there is a need; there the  
Chaplain needs to be.





## A Gift for **the Future**

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We would be honoured if you were to include a Gift in your will in support of the works and ministries of the Church outlined in this Guide.

Your support will enable us to continue to provide spiritual enrichment, care, education and practical help to a wide cross section of our community your generosity towards others will extend beyond your lifetime - which is certainly a wonderful legacy of Faith.

This guide has been prepared for your assistance. Of course, if you wish to discuss any of the work you may be able to

support and how your gift will continue to help others in the years ahead, simply give us a call, (02) 4979 1142

To discuss your plans and to help you make provision for your wishes for the future, take this guide and your Personal Information Record along with you to your local/family solicitor, who will help you prepare a valid Will.

The Law Society of NSW provides a list of all solicitors in NSW and can be contacted on (02) 9926 0300 if you need to find a solicitor in your area who can assist.

# Your lasting Gift

A Will is your formal declaration of your wishes for the distribution of your estate — the property, money, shares, stocks, bonds, other assets or personal possessions, owned by you at the time of your death.

A Bequest is a gift of a specific item or part or all of that estate, directed by your Will for the benefit of family members, friends or causes which have been important to you during your lifetime.

For your final wishes, including any bequests, to be complied with you must have a valid Will.

That means that it covers all of your possessions, it is in a legal format, it properly represents your wishes for the distribution of your estate and nominates the person or persons whom you wish to act as your representative/s when the time comes.

For this reason it is very important that you arrange to have a valid Will prepared by a Solicitor.

This will give you peace of mind and help to avoid any unnecessary difficulties, conflict or misunderstanding for your family in the future.

## **If you wish to leave a bequest, there are a number of ways to do so:**

- ▶ Making a Gift of a specific monetary amount
- ▶ Making a Gift of particular belongings.
- ▶ Making a Gift of particular property you own.
- ▶ Making a Gift of a specified part of your estate (% of your estate)
- ▶ Making a Gift of that part of your estate that remains after you have provided for loved ones.
- ▶ Making a Gift of your whole estate.







## Wording for **Your Will**

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If you wish to assist the Church to continue its works and ministries, we recommend the following wording:

### For a Gift of a sum of money:

#### **To my Parish**

"I Give and Bequeath free of all duties – death, estate, succession or otherwise payable in consequence of my death, the sum of \$ \_\_\_\_\_ to St \_\_\_\_\_ Catholic Parish, located at \_\_\_\_\_ to be applied (at the discretion of the Parish Priest) OR (for a specific purpose for the benefit of the Parish community. Should the purpose no longer exist or cannot be executed, then the determination of purpose is at the discretion of the local Ordinary.)" *..whichever is chosen..* " I declare that the receipt of the Parish Priest shall be full and sufficient discharge to my Legal representative for the payment of the said sum and that my Legal representative shall not be bound to see to the application thereof."

#### **To the Diocese**

"I Give and Bequeath free of all duties – death, estate, succession or otherwise payable in consequence of my death, the sum of \$ \_\_\_\_\_ to the Catholic Diocese of Maitland-Newcastle to be applied (at the discretion of the local Ordinary) OR (for a specific purpose for the benefit of the Diocese. Should the purpose no longer exist or cannot be executed, then the determination of purpose is at the discretion of the local Ordinary.)" *..whichever is chosen..* "I declare that the receipt of the local Ordinary or his delegate of the Catholic Diocese of Maitland-Newcastle shall be full and sufficient discharge to my Legal representative for the payment of the said sum and that my Legal representative shall not be bound to see to the application thereof."



## For a Gift of a Proportion of an Estate:

### To my Parish

"I direct my executor/s to divide the residue of my Estate, both real and personal into \_\_\_\_ equal shares and I Give and Bequeath \_\_\_\_ shares to St \_\_\_\_\_ Catholic Parish, located at \_\_\_\_\_ to be applied (at the discretion of the Parish Priest) OR (for a specific purpose for the benefit of the Parish community. Should the purpose no longer exist or cannot be executed, then the determination of purpose is at the discretion of the local Ordinary.)" *..whichever is chosen..*

"I declare that the receipt of the Parish Priest shall be full and sufficient discharge to my Legal representative for the payment of the said sum and that my Legal representative shall not be bound to see to the application thereof."

## For a Gift of Specific Property:

### To my Parish

"I Give and Bequeath the following items of my property and effects to St \_\_\_\_\_ Catholic Parish, located at \_\_\_\_\_ to be applied (at the discretion of the Parish Priest) OR (for a specific purpose for the benefit of the Parish Community. Should the purpose no longer exist or cannot be executed, then the determination of purpose is at the discretion of the local Ordinary.)" *..whichever is chosen..*

"I declare that the receipt of the Parish Priest shall be full and sufficient discharge to my Legal representative for the payment of the said sum and that my Legal representative shall not be bound to see to the application thereof."

### To the Diocese

"I direct my executor/s to divide the residue of my Estate, both real and personal into \_\_\_\_ equal shares and I Give and Bequeath \_\_\_\_ shares to the Catholic Diocese of Maitland-Newcastle to be applied (at the discretion of the local Ordinary) OR (for a specific purpose for the benefit of the Diocese. Should the purpose no longer exist or cannot be executed, then the determination of purpose is at the discretion of the local Ordinary.)" *..whichever is chosen..*

"I declare that the receipt of the local Ordinary or his delegate of the Catholic Diocese of Maitland-Newcastle shall be full and sufficient discharge to my Legal representative for the payment of the said sum and that my Legal representative shall not be bound to see to the application thereof."

### To the Diocese

"I Give and Bequeath the following items of my property and effects to the Catholic Diocese of Maitland-Newcastle to be applied (at the discretion of the local Ordinary) OR (for a specific purpose for the benefit of the Diocese. Should the purpose no longer exist or cannot be executed, then the determination of purpose is at the discretion of the local Ordinary.)" *..whichever is chosen..*

"I declare that the receipt of the local Ordinary or his delegate of the Catholic Diocese of Maitland-Newcastle shall be full and sufficient discharge to my Legal representative for the payment of the said sum and that my Legal representative shall not be bound to see to the application thereof."



## Changing Your Will

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If for any reason you wish to amend your current Will, you may do so by advising your solicitor of your new wishes or changed circumstances. It is important however that you revise your Will on occasions where family, life or financial circumstances change.

These would include:

- ▶ Marriage
- ▶ The birth of children
- ▶ Career changes or retirement
- ▶ Changed financial circumstances
- ▶ Serious or ongoing illness, injury or medical condition
- ▶ A change in relationships you have with family or loved ones
- ▶ A change in the relationships of children and loved ones
- ▶ Guardianship of children
- ▶ Divorce or death of a spouse/partner.

# Personal Details

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This personal record has been compiled for the express purpose of assisting you in recording important personal and financial information for you, your family and loved ones.

We recommend that you keep this in a safe place – but remember to make sure you share this information with your spouse/family/solicitor or executor and they know your wishes and where to access this information.

Full name .....

(Known as) if applicable .....

Address .....

.....

State ..... Postcode .....

Date of Birth ..... Place of Birth .....

Nationality by Birth .....

Date of Naturalisation .....

Passport No ..... Issue Date .....

Issued at City ..... State .....

Driver's Licence No .....



## Persons to notify in an emergency

Name .....

Relationship .....

Contact Details .....

.....

Name .....

Relationship .....

Contact Details .....

.....

Name .....

Relationship .....

Contact Details .....

.....

## Medical Information

Medicare Card No. ....

Private Health Insurance .....

Policy No. ....

General Practitioner .....

Phone .....

Medical Specialist .....

Phone .....

Specialisation .....

Phone .....

Dentist .....

Phone .....

Optometrist .....

Phone .....





## Personal Advisers

Parish ..... Priest .....

Contact Details .....

Solicitor ..... Contact Details .....

Trustee Company ..... Contact Details .....

Bank Accounts .....

BSB ..... Account Number ..... Name .....

BSB ..... Account Number ..... Name .....

BSB ..... Account Number ..... Name .....

Insurance Details .....

Company ..... Policy number .....

Contact Details .....



## Special Arrangements

General Power of Attorney is held by .....

Contact Details .....

.....

Enduring Power of Attorney is held by .....

Contact Details .....

.....

Appointment of Enduring Guardian is held by .....

Contact Details .....

.....

The Executors of my Will are .....

Name .....

Contact Details .....

.....





## Funeral Arrangements

I have/do not have a prepaid funeral plan .....

I wish to be cremated/buried .....

I have reserved a lot/niche at .....

My preferred priest/celebrant to conduct the service is .....

The service is to be held at .....

My preferred funeral director is .....

My favourite hymn/songs are .....

My favourite Bible reading is .....

My favourite flowers are .....

In lieu of flowers, donations should be made to .....



The most acceptable return a benefactor can receive from those on whom he bestows favours, is a countenance testifying the gratitude of the heart. ”

**Catherine McAuley**



This booklet is provided as an information service for our faith community. It is not a legal document and provides guidance only. We suggest that after discussing/consulting with family in regards to the matters contained herein, you should seek legal advice in all matters pertaining to the writing and updating of your will.



**Business and Community Engagement Office**

841 Hunter Street, Newcastle West NSW 2302 | PO Box 756, Newcastle NSW 2300

**Phone:** (02) 4979 1142 **Facsimile:** (02) 4979 1149 **Email:** [bequest@mn.catholic.org.au](mailto:bequest@mn.catholic.org.au)

[www.mn.catholic.org.au](http://www.mn.catholic.org.au)