

# GUIDE TO BEQUESTS



**DON DUNSTAN  
FOUNDATION**



Flinders  
University

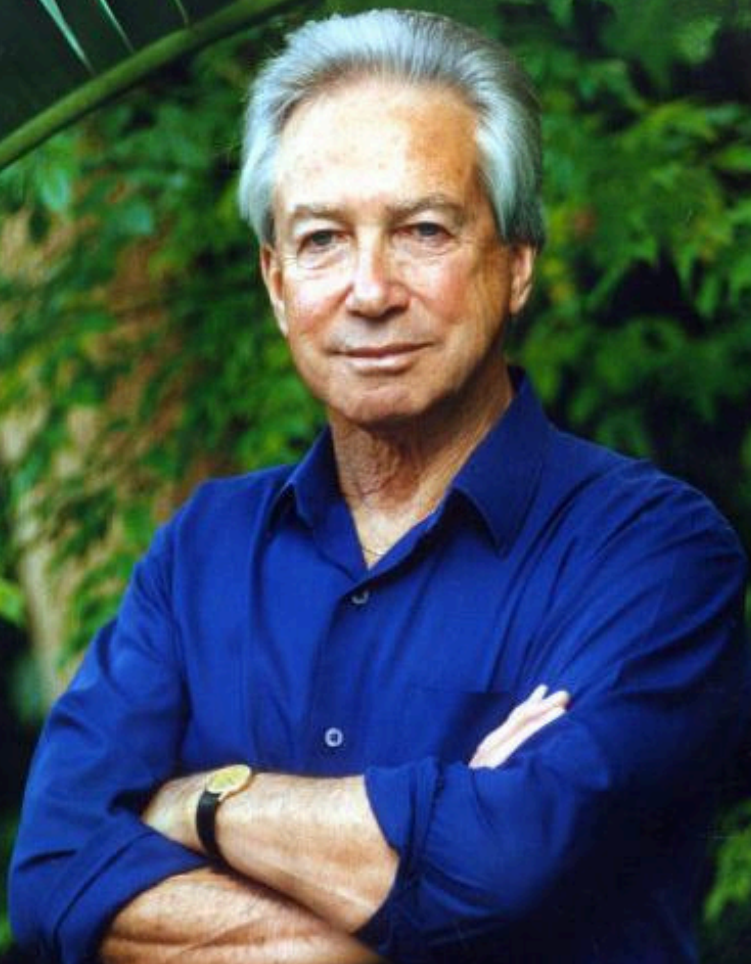


THE UNIVERSITY  
of ADELAIDE



"I want my death to be useful. My fervent hope is that public support will allow the Don Dunstan Foundation to become a driving force in the making of a better fairer society for us all."

*Don Dunstan*



# DONDUNSTAN FOUNDATION

## Who We Are

The Don Dunstan Foundation is a thought leadership organisation. We work on collaborative projects to inspire action for a fairer world, building on the legacy of the late Premier the Hon Don Dunstan AC QC.

## Our Team Values

These team values were established in 2018 and will be reviewed as required.

- **Passion:** We are dedicated to the work we do. We are motivated to achieve great results, and have fun getting there.
- **Collaboration:** We work closely with those who have expertise in our key priority areas, sharing knowledge and resources.
- **Inclusive:** We value individuals with diverse backgrounds and talents and encourage them to contribute and grow.
- **Professional:** We are organised and efficient in everything we do and set high standards for ourselves.
- **Progressive:** We believe in fairness and equality, and that everyone deserves the opportunity to live a decent, fulfilling, and economically secure life.
- **Enterprising:** We are ambitious and look for progressive and innovative ways to turn ideas into actions
- **Fair:** We are democratic and honest and committed to doing business the right way.
- **Agile:** We are dynamic and think proactively, with a culture that prioritises continuous improvement.

## Foundation Values

People at the Don Dunstan Foundation are drawn together by a shared vision of a democratic society that celebrates the values set out by its founder and namesake, the late Premier Don Dunstan.

### These values are:

- **Cultural diversity**
- **The freedom of individuals to control their lives**
- **The just distribution of global wealth**
- **Democratic and inclusive forms of governance**
- **Respect for fundamental human rights**
- **Respect for Indigenous people and protection of their rights**



# BEQUESTS

## What is a Bequest?

A bequest can be a way of saying thank you to our organisation but it can also be a way of extending support for issues you hold dear into the future. Leaving a bequest in your Will can provide you with confidence that there will be people in the world continuing to passionately fight for causes and achieve outcomes for our society that you believe are important. Your bequest to the Don Dunstan Foundation will provide an important and everlasting benefit to humanity; an investment in the future well-being of the community and the continuing of Don Dunstan's vision for a just society. You will be actively ensuring that the Foundation can achieve its aims and objectives.

## Types of Bequests

There are two types of bequests; unrestricted or restricted: **Unrestricted Bequests** These are bequests where the benefactor places no restrictions on the use of the bequest by the Don Dunstan Foundation. **Designated Bequests** These are bequests where the benefactor stipulates the purpose for which they would like the bequest to be used, usually from the existing range of activities conducted by the Foundation but on occasion specifying a specific initiative within the scope and objectives of the Foundation, for example, an art award or project such as homelessness & housing.

It is recommended that you speak to a financial adviser and/or lawyer when making your Will.

If you are considering leaving your bequest to the Don Dunstan Foundation we would appreciate being informed of your thoughts and intentions. This will enable us to serve your needs now and in the future.

An expression of interest is on page 7 of this information booklet, please return this form marked **CONFIDENTIAL** to:

The Chief Executive Officer  
Don Dunstan Foundation  
Level 8, 115 Grenfell St  
Adelaide, SA 5005 Australia

Telephone: (08) 8313 3364  
Email: [dunstan.foundation@adelaide.edu.au](mailto:dunstan.foundation@adelaide.edu.au)

If you would like to discuss The Don Dunstan Foundation's bequest options further, please contact David Washington (08) 8313 6247 or email [david.washington@adelaide.edu.a](mailto:david.washington@adelaide.edu.a)



# BEQUESTS

## **Your Bequest will help make the vision a reality**

Bequests are a vital source of funding allowing long-term planning and are encouraged as a way of helping to ensure successful outcomes in relation to the work undertaken by The Don Dunstan Foundation in the future. You can help this work by including The Don Dunstan Foundation in your Will.

Your bequest to The Don Dunstan Foundation will be an investment in the future well-being of the Australian community, by supporting much needed research and educational programs, by inspiring individuals to contribute to public debate and the production of ideas, in shaping public thinking and in continuing the work towards implementing Don Dunstan's vision of a just society.

## **Suggested forms of Bequest wording**

The following examples of wording are meant only as a guide to help you in leaving a Bequest in your Will to The Don Dunstan Foundation.

### **ENTIRE ESTATE**

I GIVE to The Don Dunstan Foundation, 230 North Terrace, Adelaide University, South Australia, 5005, the whole of my estate of whatsoever nature or kind and wheresoever situated to be applied for the general purposes of the said Foundation in such manner as the Trustees of the said Foundation may determine and I DECLARE that the receipt of the Treasurer or other authorised officer for the time being of the said Foundation shall be a full and sufficient discharge of this bequest to my executor(s) and Trustee(s).

### **RESIDUE OF AN ESTATE**

I GIVE the residue of my real and personal property whatsoever or wheresoever situated to The Don Dunstan Foundation, 230 North Terrace, Adelaide University, South Australia, 5005, to be applied for the general purposes of the said Foundation in such manner as the Trustees of the said Foundation may determine and I DECLARE that the receipt of the Treasurer or other authorised officer for the time being of the said Foundation shall be a full and sufficient discharge of this bequest to my executor(s) and Trustee(s).

### **REAL ESTATE**

I GIVE my interest in the real estate at .....address..... free from all debts (secured or unsecured) and all duties (whether Federal or State) payable in respect of my estate to The Don Dunstan Foundation, 230 North Terrace, Adelaide University, South Australia, 5005, to be applied for the general purposes of the said Foundation in such manner as the Trustees of the said Foundation may determine and I DECLARE that the receipt of the Treasurer or other authorised officer for the time being of the said Foundation shall be a full and sufficient discharge of this bequest to my executor(s) and Trustee(s).

### **SPECIFIC PERSONAL PROPERTY**

I GIVE my .....description of property, shares, furniture, work of art, etc..... free from all debts (secured or unsecured) and all duties (whether Federal or State) payable in respect of my estate to The Don Dunstan Foundation, 230 North Terrace, Adelaide University, South Australia, 5005, to be applied for the general purposes of the said Foundation in such manner as the Trustees of the said Foundation may determine and I DECLARE that the receipt of the Treasurer or other authorised officer for the time being of the said Foundation shall be a full and sufficient discharge of this bequest to my executor(s) and Trustee(s).

# A SPECIFIC LEGACY

## Specifying what you are giving

### Example 1

I GIVE the sum of \$..... to The Don Dunstan Foundation, 115 Grenfell Street, Adelaide, South Australia, 5005, to be applied for the general purposes of the said Foundation in such manner as the Trustees of the said Foundation may determine.

### Example 2

I GIVE .....% of my estate free from all debts (secured and unsecured) and all duties (whether Federal or State) payable in respect of my estate to The Don Dunstan Foundation, 115 Grenfell Street, Adelaide, South Australia, 5005, to be applied for the general purposes of the said Foundation in such manner as the Trustees of the said Foundation may determine.

### Example 3

I GIVE my Life Insurance Policy .....Insurance Policy Details.....free from all debts (secured and unsecured) and all duties (whether Federal or State) payable in respect of my estate to The Don Dunstan Foundation, 115 Grenfell Street, Adelaide, South Australia, 5005, to be applied for the general purposes of the said Foundation in such manner as the Trustees of the said Foundation may determine.

## If you wish to leave a Bequest for specific purposes

You may prefer that the bequest you leave is used in a specific way or for a particular purpose. If this is the case, instead of the phrase .... “to be applied for the general purposes of the said Foundation in such manner as the Trustees of the said Foundation may determine” ..... insert in its place wording which describes your preference for the way in which you would wish your gift to be used by the Trustees.

To enable the Foundation to fulfil your wishes, clearly state your preferences so that your intentions are easily understood. You may like to discuss your intentions with the Foundation prior to making your Bequest, to ensure that your wishes will be able to be fulfilled.

The following examples of wording are meant only as a guide to help you in leaving a Bequest for specific purposes in your Will to The Don Dunstan Foundation.

### Examples

“... to be applied for the purpose of scholarships by the said Foundation ...”

“... to be applied for educational purposes by the said Foundation ...”

“... to be applied for the purpose of research related to ..... by the said Foundation ...”

“... to be applied for the purpose of ..... by the said Foundation ...”



# OTHER WAYS TO HELP

**Help Don's legacy live on and Support the Don Dunstan Foundation to help create a fairer world.**

## **MAKE A DONATION**

Donations can be general, or committed to individual projects – this is a powerful way to make a difference to an area that means the most to you.

## **BECOME A SUPPORTER**

Sign up and invest in a better future by becoming a Don Dunstan Foundation Supporter.

## **VOLUNTEER WITH US**

Register to volunteer your time and enthusiasm to assist at events, provide pro-bono advice and assistance on specific projects



# EXPRESSIONS OF INTEREST

**TITLE:**

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**FIRST NAME:**

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**SURNAME:**

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**POSTAL ADDRESS:**

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**SUBURB:**

---

**STATE:**

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**POSTCODE:**

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**PHONE:**

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**EMAIL:**

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1. ☐ I would like to inform DDF, that when making my last will and testament I will leave a Bequest Gift to the Don Dunstan Foundation.
  
2. ☐ I would like to talk to the Chief Executive Officer regarding how I could leave a Bequest Gift to the Don Dunstan Foundation.

Please return this form marked  
CONFIDENTIAL to:  
Don Dunstan Foundation  
Level 8, 115 Grenfell St  
Adelaide, SA 5005 Australia

Or via email: [dunstan.foundation@adelaide.edu.au](mailto:dunstan.foundation@adelaide.edu.au)



# DON DUNSTAN FOUNDATION

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The Don Dunstan Foundation  
Level 8, 115 Grenfell St  
Adelaide SA 5005

P: (08) 8313 3364  
E: [dunstan.foundation@adelaide.edu.au](mailto:dunstan.foundation@adelaide.edu.au)  
W: [www.dunstan.org.au](http://www.dunstan.org.au)