



GRATTAN INSTITUTE

# Leave a gift in your Will

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# **Thank you for considering a gift in your Will to Grattan Institute.**

**Grattan Institute holds Deductible Gift Recipient status and is fully tax exempt.**

Important information that you or your solicitor need to include:

Legal name: GRATTAN INSTITUTE

ABN: 17 134 323 756

Address: 8 Malvina Place, Carlton, Vic, 3053

# Types of gifts

The following is a guide for you and your solicitor and provides basic information. It should not be taken as legal advice.

Types of gifts include:

- **A residuary or residual gift:** made from the balance remaining from your estate once gifts of money and specific items have been distributed. This is a practical and valuable way to leave a gift in your Will to Grattan, because it maintains the relative value of your gift.
- **A pecuniary gift:** a specified sum of money from your estate. The value of this gift may change significantly over time due to inflation.
- **A fixed amount:** leaving a specific sum. This gift may need to be changed over the years to account for inflation and changes to your circumstances. It is likely to diminish over time.
- **A specified gift:** leaving a particular item of value such as a residential property, company shares, or artwork.





# Writing your Will

We recommend that you seek professional legal advice when updating and writing your Will. Your solicitor will be able to advise the best way to leave a gift to Grattan Institute.

## Example wording

"I [insert name] GIVE [the sum of] or [specified items] or [the residue of my estate] to Grattan Institute ABN 17 134 323 756 currently of 8 Malvina Place, Carlton, VIC, 3053, to be used for the general purposes of Grattan Institute.

I declare that the receipt of the Company Secretary or other Authorised Representative of Grattan Institute shall be a complete discharge to my Executors or Trustees."



# Thank you

For a confidential discussion or for further information, please contact:

Ant Clark - Head of Philanthropy  
Grattan Institute

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