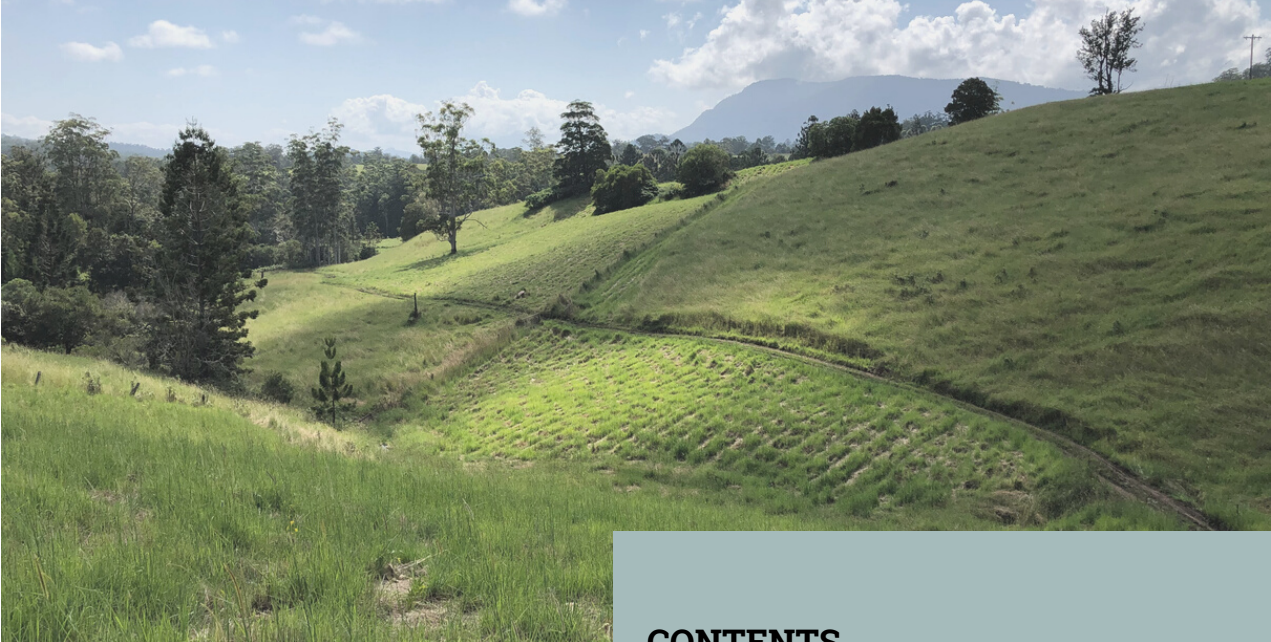


# **YOUR LEGACY, AUSTRALIA'S FUTURE**

A guide to leaving a gift in your Will  
to support an Australian charity



# WHY LEAVING A LEGACY GIFT MATTERS



Did you know that just over 7% of all giving to charity in Australia, is legacy giving?

Leaving a gift in your Will, otherwise known as a bequest, planned gift or legacy gift, is a powerful way to support the amazing work that Australian charities do. There are over 5000 registered charities in Australia and many of them rely on gifts in Wills to plan and commit to future projects and programs.

Legacy gifts are possible for everyone, no matter what your current income. Leaving a gift of just 2% of your estate can have a significant impact for your chosen charity.

This simple guide gives the basic information you need to leave a gift in your Will to an Australian charity.

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# HOW TO LEAVE A GIFT IN YOUR WILL

You can write a simple Will using a kit from Australia Post, or you can make a Will using an online Will writing service. For more complex wishes, you can go to a solicitor to have your Will made.

We strongly recommend that you seek independent, professional legal and tax advice when making or changing your Will to ensure your intentions will be carried out and distributions to beneficiaries are according to your wishes.

You have a few options for leaving gifts in your Will:

- **Whole or part of your estate** where your entire estate, or any part of it, is left to your chosen charity/charities.
- **A residual gift** where the remainder (or a proportion of the remainder) of your estate will be paid to your chosen charity/charities. This is a simple way to leave a gift that won't change any specific bequests to loved ones. It also retains its value over time (unlike a specific gift that can reduce in value with inflation).
- **A specific gift** including any sum of money, cash balances in a bank account, a residential house, rural land, commercial real estate, or stocks and shares.
- **An in-specie gift**, which is an asset that can be transferred directly from your estate to your chosen charity/charities. If you're considering leaving real estate or shares to charity, this option allows the asset to be transferred directly to the charity of your choice and may save your estate paying capital gains tax on the sale of the asset. Please ensure you seek appropriate legal advice to ensure this is applicable to your circumstance.

## Example wording for your Will:

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*I bequeath [the whole/ a percentage/ something specific/residue] of my estate to Carbon Neutral Charitable Fund, ABN 99 124 696 966, of City West Lotteries House, 2 Delhi Street, Unit #11, West Perth, WA 6005 for purposes that it shall determine, and this bequest will be free from all duties. The receipt of this bequest by any authorised officer of Carbon Neutral Charitable Fund shall form valid discharge to my executor.*

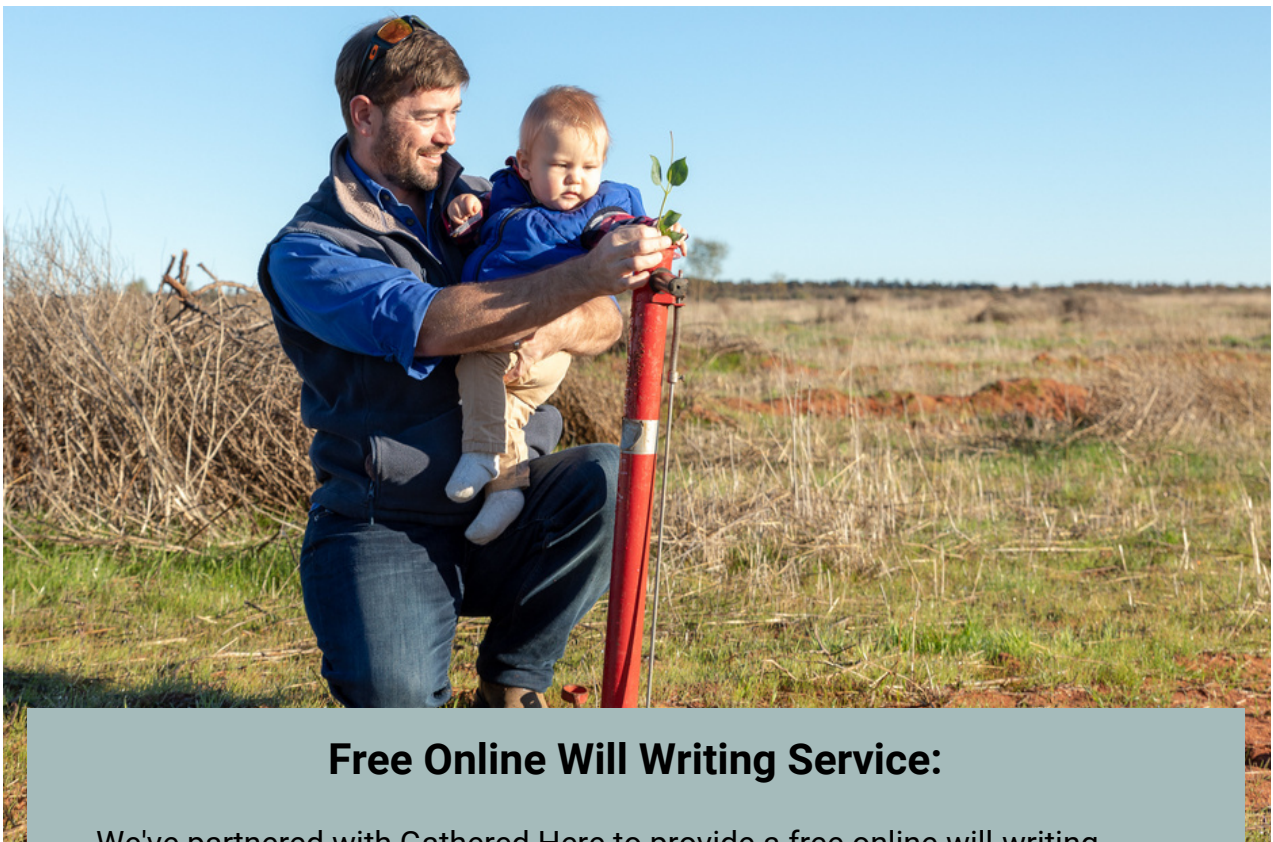
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Please note: Carbon Positive Australia is the trading name of Carbon Neutral Charitable Fund and is a Deductible Gift Recipient. Any bequests should be left to Carbon Neutral Charitable Fund.

# SHARING YOUR WISHES

Communicating with your family about your Will really matters. One of the most important things you can do when you leave a legacy gift to charity, is to share your intentions with your immediate family and beneficiaries. Letting your loved ones know why leaving a gift to your chosen charity matters to you, can ensure that your estate is distributed according to your wishes.

Your choice of Executor can also make all the difference between a smooth Wills process and a difficult one. You might like to consider who is best placed and most willing to carry out your wishes.



## Free Online Will Writing Service:

We've partnered with [Gathered Here](#) to provide a free online will-writing service for our donors, supporters, and anyone else who'd like to leave a climate-healthy legacy.

You can create your Will simply and easily in a little over ten minutes - just complete the online form [here](#).

Even a small gift in your Will to Carbon Positive Australia creates a lasting difference to the health of landscapes, communities and climate.

# THE CARBON POSITIVE AUSTRALIA STORY



We are an independent charity that brings together individuals, groups and organisations to plant trees and take practical action for a carbon positive future.

***“Every action we take has a carbon impact. Being carbon positive is about always choosing the positive actions that create a thriving environment.”*** - Louise Tarrier, CEO

Like you, we want a liveable future for our children and grandchildren and to mitigate the impacts of climate change. Supporting biodiverse native ecosystems is essential for our health and wellbeing. We have a vision of a carbon positive Australia, where we have not only reduced our current carbon emissions but where our climate is stable and we are all thriving.

## YOUR LEGACY SUPPORTS:

- Restoring Australia's unique, biodiverse natural habitat through planting trees and the generation of reforestation carbon offsets;
- Encouraging, engaging and informing the community about climate change, the environment and how we can all be part of the solution; and
- Empowering everyone to take active steps to calculate and reduce their carbon footprint.

# YOUR IMPACT

Donations to Carbon Positive Australia plant trees and sequester carbon through projects that increase canopy cover and biodiversity, and that have positive climate, health and wellbeing outcomes. Because climate and biodiversity are your focus we plant:

## **No. 01 – DEGRADED LAND**

To increase biodiversity and improve soil health.

## **No. 02 – CITY & URBAN AREAS**

To reduce urban heat island effects, thus improving the wellbeing of those living in disinvested communities, reducing heat-related illness, and boosting overall climate resilience.

## **No. 03 – REMOTE REGIONS**

To fund plantings, in collaboration with Indigenous-led and regional projects, that provide amenity and connection to Country, increase wellbeing and foster community health.

## **OUR PLANTING HAS:**

- Sequestered carbon to mitigate the impacts of climate change
- Increased biodiversity and added habitat for rare and endangered species
- Stopped already degraded land deteriorating further
- Had a positive impact on regional and farming communities.



We take a nature led approach and are passionate about providing ecologically sensitive planting that protects our agricultural land and environment. We only plant biodiverse native species, and specialise in working with landholders to create innovative solutions for carbon planting. We are renowned for our research and monitoring of ecological outcomes.

# YOUR LEAFY LEGACY

When you include Carbon Positive Australia in your Will, you are making a unique and deeply appreciated commitment that will help us continue to not only sequester carbon, but also restore degraded land, increase biodiversity, and help communities become more climate change resilient. Your gift will be used where and when it is most needed.



Your legacy gift will:

- ensure trees in our planting projects have longevity - enabling monitoring and care of those trees into the future.
- empower multiple generations of Australians to take positive climate action and get native trees in the ground where they are most needed.
- fund research that improves plantings so that they support ecosystem health and are able to withstand climate change.

A legacy gift is one of the most effective and long-lasting ways you can support our work. We rely on our donor's generosity to enable us to plan multi-year restoration projects, ensure the permanence of trees planted in our projects, and commit to supporting community planting across Australia. Many of our carbon projects have 100-year permanence - meaning the trees are protected for 100 years. Gifts from Wills are essential for ensuring this protection now and into the future.

Our donors also fund community groups across Australia to plant native trees in their neighbourhoods. When you leave a legacy gift you are enabling diverse communities to take powerful and practical action on climate change in their local area.

Without you, none of this much-needed work can happen. Whatever you choose to bequeath to Carbon Positive Australia, your contribution is vital and will be used to ensure a climate-healthy future for all. Even leaving a gift of just 2% of your estate will make a significant impact.

# JOINING THE ACACIA LEGACY CIRCLE



When you make the commitment to a climate healthy future and include Carbon Positive Australia in your Will, you become a member of our [Acacia Legacy Circle](#).

Acacias are an essential pioneer species - they are resilient, hardy and vigorous, preparing the ground for thriving future forests. We believe those who leave a gift in their Will are pioneering in the same way - providing for future growth, resilience and climate health for all.

The Acacia Legacy Circle is a special society that recognises donors who include Carbon Positive Australia in their Will. For over 20 years, we've worked to sequester carbon by undertaking ecologically sensitive tree planting, improving biodiversity and contributing to a healthy climate for Australia and beyond. The vital support of the Acacia Legacy Circle and other individuals who have made special commitments makes this work possible.

Everything we have achieved has been achieved with our donors.

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## Why become an Acacia Legacy Circle member?



As an expression of our gratitude for your commitment, Acacia Legacy Circle members receive exclusive access to member-only events and naming in our Impact Report in the year of your gift (if you wish).

If you have left a gift to Carbon Positive Australia in your Will, please let us know by emailing [philanthropy@carbonpositiveaustralia.org.au](mailto:philanthropy@carbonpositiveaustralia.org.au) and we will gladly welcome you to the Acacia Legacy Circle.



# FREQUENTLY ASKED QUESTIONS

## What is a legacy gift?

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A legacy gift is one left in your Will - also known as a bequest. You can leave a legacy gift by writing a new Will, or by making an addition (codicil) to your existing Will. We recommend you seek independent legal advice when making or changing your will.

## What is the best way to leave a gift in my Will to Carbon Positive Australia?

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The best way is to leave either:

- a residual gift - what remains after all your other provisions have been made, enabling you to put your loved ones first. Residual gifts keep up with inflation and are a very effective way to support our work into the future; or
- an in-specie gift - where you transfer an asset directly to Carbon Positive Australia. This option may save your estate capital gains tax and is particularly appropriate for the transfer of land and shares.

You can also leave a percentage of your estate or a monetary gift - a fixed sum of money to be left to Carbon Positive Australia.

## I want to leave a gift for a specific planting project. Can I do this?

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Receiving flexible funds enables us to direct resources to the parts of our work that need it most, whether it be carbon sequestration projects, community tree planting, education of the public on the importance of taking action for climate health, or research that supports our carbon planting work and that of other organisations. Leaving a gift for the charity's general use is the most effective as it means your gift will definitely be used where it's needed most. Leaving a gift to a particular planting project may mean that it can't be used. This could happen if we've finished planting at a site or are doing a different kind of planting in the future. Because of this, we ask that you do not assign your gift to a particular project, type of work or region.

## I want to leave land to Carbon Positive Australia. Can I do this and how will it be used?

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We welcome gifts of land in Australia. Some donated land may be suitable for planting for carbon sequestration. This depends on where it is, what the geography is like, the condition of the soil and other factors. Land which is not suitable for planting would be sold and the funds used to support our work, as with other gifts from Wills. If you are considering leaving a gift of land and would like to discuss your wishes, please contact [philanthropy@carbonpositiveaustralia.org.au](mailto:philanthropy@carbonpositiveaustralia.org.au) and one of our friendly team will be in touch.

# FREQUENTLY ASKED QUESTIONS



## **Can I leave you my house, other property or shares?**

You can, however there are time and monetary costs incurred by Carbon Positive Australia in converting these gifts to cash (which we would need to do in order to put the funds to good use supporting our work). Our preference is for monetary gifts or gifts of land as this reduces these costs.

## **Can Carbon Positive Australia help me write my Will?**

No, we don't have solicitors on our staff. We recommend you consult a solicitor. There is also a Public Trustee in every state of Australia that offers Will writing services.

## **Can I make Carbon Positive Australia the Executor of my Will?**

No, whilst we appreciate your trust in us, we don't have the resources to take on this role and it's not our area of expertise.

## **My relative has passed away and left a gift in their Will for Carbon Positive Australia. What do I need to do?**

We deeply appreciate gifts left to us by generous supporters. Please ask the Executor to notify us in writing of the gift by sending an email to: Head of Community & Philanthropy, [philanthropy@carbonpositiveaustralia.org.au](mailto:philanthropy@carbonpositiveaustralia.org.au) so that we can begin the process of transfer.

Our Acacia Legacy Circle ([see page 7](#)) is open to the relatives of those who have left a gift to Carbon Positive Australia in their Will. If you would like to join, please email [philanthropy@carbonpositiveaustralia.org.au](mailto:philanthropy@carbonpositiveaustralia.org.au) and let us know.