

Frequently Asked Questions

How can I ensure my intentions and wishes are upheld?

Bush Heritage Australia highly recommends you seek independent, professional legal and tax advice when making or changing your Will to ensure your intentions will be realised and the distributions to beneficiaries will be maximised. Having your Will professionally written should not be expensive and provides peace of mind knowing your wishes are more likely to be upheld. If you need a solicitor, the law society of your state or territory can refer you to one.

Contact information for state and territory law societies:

- The Law Institute of Victoria, (03) 9607 9311
- The Law Society of NSW, (02) 9926 0333
- The Queensland Law Society, 1300 367 757
- The Law Society of South Australia, (08) 8229 0222
- The Law Society of Western Australia, (08) 9342 8600
- The Law Society of Tasmania, (03) 6234 4133
- The ACT Law Society, (02) 6274 0300
- The Law Society Northern Territory, (08) 8981 5104

What type of gifts can I leave to Bush Heritage in my Will?

- **Whole or part of your estate**, whereby your entire estate, or any part of it, is left to Bush Heritage.
- **A residual gift**, whereby the remainder (or a proportion of the remainder) of your estate will be paid to Bush Heritage. This is a simple way to leave a gift that will not interfere with any specific bequests to loved ones. It will also retain its value over time (unlike a specific gift that can reduce in value with inflation).
- **A specific gift**, such as any sum of money, cash balances in a bank account, a residential house, commercial real estate, or company shares.
- **An in-specie gift**, which is an asset that can be transferred directly from your estate to Bush Heritage. If you are considering leaving real estate or shares to Bush Heritage, this option allows the asset to be transferred directly to Bush Heritage and may save your estate paying capital gains tax on the sale of the asset. Seek appropriate legal advice to ensure this is suitable to your circumstance.

What is Bush Heritage Australia's DGR status?

Bush Heritage Australia is a charity registered with the Australian Charities and Not-for-profit Commission. The Australian Taxation Office has endorsed Bush Heritage Australia for charity tax concessions, including exemption from income tax, and has also endorsed its public fund, Bush Heritage Australia Fund, as a deductible gift recipient. Bush Heritage Australia Fund, the public fund of Bush Heritage Australia, is listed on the Register of Environmental Organisations.

What is Bush Heritage's correct legal name, ABN, and address?

BUSH HERITAGE AUSTRALIA, ABN 78 053 639 115,
Level 10, 637 Flinders Street, Docklands VIC 3008.

Will Bush Heritage keep gifts of property as part of its reserve network?

This depends on a range of factors, so it is important to discuss your wishes with a member of our team if you are considering leaving a bequest of land to Bush Heritage.

Is there any specific wording I should use?

Once you have chosen the right type of bequest for you, speak with your solicitor to have your Will written. Please note the following wording is a **guide only** and subject to your solicitor's advice.

"I give (*insert one of the following*)

- **Specific Amount:** the sum of \$X (*insert financial amount*)
- **Whole of Estate:** my entire Estate
- **% Of Estate:** (*insert percentage or proportion*) of my Estate
- **% Of Residue:** (*insert percentage or proportion*) of the residue of my Estate
- **Real Estate:** all of my interest in my real property described as (*insert legal property tenure description / title details*)
- **Shares:** my shares in (*insert description of publicly listed company*)

to Bush Heritage Australia (ABN 78 053 639 115) to be applied towards conservation purposes in accordance with the Constitutional objectives of Bush Heritage Australia in its absolute discretion and I declare that the receipt of the Treasurer or other authorised officer of Bush Heritage Australia shall be a sufficient discharge for my Trustees."

Can I leave my superannuation or life insurance policy to Bush Heritage?

You can, however superannuation and life insurance do not automatically form part of your Estate. We recommend speaking to a legal professional make the appropriate arrangements.

Can I nominate Bush Heritage as my executor or Power of Attorney?

Bush Heritage is unable to act as an executor. The costs of this would outweigh the benefits, as staff at Bush Heritage are not experienced or trained in estate administration. There is also a risk of perceived undue influence if your Will is contested for any reason.

Should I tell Bush Heritage about my bequest?

We understand that making a Will can be a personal and private matter. Knowing we have such generous support allows us to personally thank our supporters, plan for the future, and support the fulfillment of your wishes. If you would like to let us know about your bequest, reach out to our team via email, phone or via the confidential form on our website:

www.bushheritage.org.au/bequests

Who can I contact for more information?

You can contact our Gifts in Wills team on 1300 628 873 or email giftsinwills@bushheritage.org.au