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## **A LEGACY FOR A LONG-LASTING IMPACT:**

A gift in your Will to the Australasian Leukaemia & Lymphoma Group (ALLG) will help find new ways to treat and prevent blood cancer and improve the survival and quality of life of blood cancer patients beyond your lifetime.

# **GUIDE TO BEQUESTS**



### **Janey Stone**

"To make a bequest such as this makes me feel that I can play an active role in supporting life-saving research and doing something positive to help others. I have worked in cancer research for over 40 years. In that time I've seen a tremendous improvement in survival and quality of life of blood cancer patients due to clinical trials. Research is so important, and with more money we'll be able to find better treatments quicker. I am glad to know that my bequest will contribute to improving the lives of people with blood cancers."

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Thank you for considering a testamentary gift to the Australasian Leukaemia & Lymphoma Group (ALLG) in your Will. Your support will assist us to run clinical trials to ensure new interventions are safe, effective and potentially, life changing for patients diagnosed with blood cancer.

**FACT**

All major advances in cancer care have come through clinical trials. Clinical trials offer a chance to help find better treatments for people living with blood cancer in the future. Without clinical trials there would be no new treatments.

Medical research has already made a profound difference to our lives. Many people with cancer are now living longer, with a better quality of life, due to clinical trials.

When you leave a bequest or donation to the ALLG in your Will, you provide our talented doctors with the vital tools they need to uncover new ways to treat and prevent blood cancer. Leaving a legacy, you will help make some of the most significant breakthroughs in blood cancer research possible.

We depend on your generosity to help us make a difference in blood cancer patients.

Sincerely;



Delaine Smith  
Chief Executive Officer

## The ALLG Research

The ALLG has been conducting clinical trials for the treatment and cure of blood cancers for over 40 years.

The ALLG has a pivotal national role in improving patient outcomes through clinical trials that focus on areas of uncertainty in treatment practice, promote critical investigation of new therapies, and contribute to the development of best practice treatments.

As the only not-for-profit, collaborative clinical research group in Australia and New Zealand, ALLG is dedicated to designing and conducting independent clinical trials for the treatment of blood cancers and provides the infrastructure and governance necessary for Australian and New Zealand clinicians and scientists to work together to conduct research into blood cancers.

Currently, more than 600 clinicians, scientists and support staff across Australia and New Zealand contribute to ALLG research.

Since inception in 1973, the ALLG and its predecessors have initiated 148 studies involving over 6,000 patients with blood cancers in Australia and New Zealand. This ground-breaking research continues to influence the way doctors treat blood cancer patients globally. **For patients, this means an improved chance of cure, and better quality of life.**

## Why give to the ALLG?

Our achievements in the recent past have been significant; we would like to share with you some of these milestones that are making a difference to people with a blood cancer right now and for those people who will diagnose in the near future:

- For over 40 years, ALLG clinicians and scientists have conducted ground-breaking research which has changed the way doctors around the world treat patients with a diagnosed blood cancer.
- Discoveries of treatment for rare blood cancer making treatment available where there may be no other treatment offered previously.
- Our Clinical Trial portfolio extends to 17 actively recruiting studies including 5 phase III randomised studies.
- All of the ALLG clinical trials provide an opportunity for patients to donate a blood sample for future research. The laboratory research provides insight into the biology of these diseases and allows scientists to develop innovative new therapies.
- ALLG trials also enable participation in Quality of Life (QOL) assessment activities. The ALLG believes that it is important to always correlate the efficacy of new innovative treatment with the real impact on a person's QOL.

## What is a bequest?

A Bequest is when you make a gift of personal property, such as cash, real estate, a car, shares etc. to a named person or organisation in your Will.

A bequest is a simple but powerful way to provide support for the causes that matter the most to you. It transforms your Will into one of the most potent tools for change there is, with little or no impact on your lifestyle today.

## What are the different types of bequest?

A specific bequest is a nominated amount or specific gift.

A percentage bequest is a nominated percentage of your estate.

A residual bequest is what remains of your estate after family/friends have been provided for and all debts/taxes/expenses have been paid. This type of bequest maintains its relative value and automatically adjusts as the value of your estate increases.

***No matter which form of bequest you choose, your gift will be extremely valuable – helping to fund the research that could end the suffering caused by blood cancer.***

## The importance of a Will

A Will is a legal document that sets out how you would like your assets shared amongst those you care about after your death. This collection of assets is also known as your Estate. A bequest or legacy is a clause within a Will relating to a particular gift or share of your estate.

Without a Will, your assets (e.g. property, car, jewelry, superannuation) will be distributed according to the laws of the State rather than your wishes. Not having a Will can also cause a great deal of worry and expense to your family. Having a valid and up-to-date Will gives you the peace of mind of knowing that the security of your loved ones has been assured. A Will ensures

that your assets are distributed the way you want, so you can ensure you support those causes you were passionate about throughout your life.

Who should have a Will?

Anyone over the age of 18 should have a valid Will, which should be updated every 3-5 years so that it reflects any changes in your circumstances, such as:

- If you get married or intend to get married;
- If you have children;
- If you separate from your spouse or de facto partner;
- If you divorce;
- If you purchase or sell a significant asset or investment (e.g. house);
- If you get involved in a new business, company or trust;
- When children or grandchildren turn 18.

Changing your Will

You can make minor changes or additions to your current Will. This is known as a Codicil. Your solicitor will help you implement this change. For the Codicil to be effective, it must be signed and witnessed. This is the simplest way of including a charity in your current Will.

***When preparing your will, we recommend that you consult a solicitor to ensure that your wishes are properly expressed using the correct legal wording.***

## Leaving a bequest to the ALLG

To leave a bequest to the ALLG in your Will, the following sample wording is recommended for use:

### **Unrestricted/General:**

“I, (your name) give (my whole estate) or (specific percentage of my estate) or (specific assets) or (the residue of my estate) or (the sum of AUD\_\_\_\_\_ ) to the ALLG for its general purposes. I declare that the receipt of an authorised officer of the ALLG will be sufficient discharge to my executors who will not be bound to see the application of the gift.”

### **Specific/Designated:**

“I, (your name) give (my estate) or (specific percentage of my estate) or (specific asset) or (the residue of my estate) or (the sum of AUD\_\_\_\_\_ ) to the ALLG for (state purposes as precisely as possible). I declare that the receipt of an authorised officer of the ALLG will be sufficient discharge to my executors who will not be bound to see the application of the gift.”

## Checklist

- My Will is up-to-date. Your Will should be updated as your circumstances change, at least every three to five years.
- My dependents are provided for. You have ensured all of your loved ones are taken care of.
- I have appointed suitable executor(s). Your executor(s) should be competent to carry out your instructions.
- I own all assets that I have bequeathed in my Will. You can only leave assets owned by you or which you have a share in.
- The intentions in my Will are clear and precise. This avoids confusion and disagreements down the track.
- I have made provision for my debts to be paid from my estate. Specifying your debts are paid before distribution of your assets ensures your beneficiaries do not inherit any of your debts.
- My Will has been drafted in the proper manner by a legal representative. To ensure your Will is valid and legal, it is recommended you use a solicitor or trustee company.
- Where applicable, guardians have been nominated. If you have young children you should consider nominating guardians to care for them in the event that something happens to you.
- I have not used beneficiaries or their spouses to witness my Will. Using a beneficiary to witness your Will usually disinherits them from their entitlements to your estate.
- My Will is stored in a safe place. It is advisable to have the original stored in a secure place such as your solicitor's office or at your local bank branch. Also ensure you have informed your executor(s) as to the whereabouts of your Will.
- Remember to include the ALLG in your Will. You can leave a smile behind by brightening the lives of blood cancer patients for years to come.

## Bequest Intention Form

This is not a legal document. It simply assists our future planning and serves as a way of recognizing your generosity. All information you provide to us will be treated in complete confidence, and does not at all bind you to your bequest should you wish to change your mind. For assistance, please call Delaine Smith, CEO on +61 3 8373 9701 [delaine.smith@allg.org.au](mailto:delaine.smith@allg.org.au)

### Your Details

**Title:** **First Name:** **Surname:**

**Address:**

**Suburb:** **State:** **Postcode:**

**Phone:** **Mobile:**

**Email:**

### Your Bequest Details

### Your Comments

### Please Tick the Relevant Box

- Yes, I have already included ALLG in my Will.
  - A copy of relevant clause in Will is attached.
  - I will inform the ALLG of significant changes to my Will.
- I would like to be kept informed about ALLG. Please send me more information.
- I would like to discuss my individual bequest with a ALLG Advisor.
- I intend to include ALLG in my Will and will advise when I do.

### Recognition

Please let us know if we are able to recognize your support by ticking one of the boxes below.

- I give permission to ALLG to list my name only as a planned gift donor in any recognition material.
- I wish my bequest intention to remain anonymous.

### Please return your completed form to:

ALLG  
Ground Floor, 35 Elizabeth Street  
Richmond, VIC 3121  
Australia  
OR  
Email: [delaine.smith@allg.org.au](mailto:delaine.smith@allg.org.au)  
Phone: +61 3 8373 9701  
Fax: +61 3 9429 8277

***Thank you for remembering ALLG in your Will.***

***With your generous support, together we can make a difference.***