



**Leaving a Gift
in your Will to
Bayley House**





A lasting legacy

1951 saw a group of parents band together in order to find a space for their children, and so Bayley House was born.

From the humble beginnings as a school through to our many community locations across Bayside Melbourne, Bayley House has been an organisation that has supported and nurtured hundreds of people with intellectual disability, and their families, over the past 70 years.

We currently provide exceptional client services for over 200 adults with intellectual disability. Our service is holistic and includes programs of support, accommodation options, recreational and social opportunities, community experiences, skill-building, and advocacy for people with disability.

Our longevity is certainly not something we take for granted and we know many individuals, organisations and groups have played key roles in getting us to this point.

With 70 years of support, experience and impact in the lives of people living with intellectual disability, we invite you to join us as the next chapter of our journey unfolds and ensure that Bayley House continues for decades to come.

By leaving a gift in your Will, you will be helping Bayley House remain strong and sustainable well into the future. We know that there is still a need for the programs and services that we provide, perhaps more than ever. A gift in your Will to Bayley House will allow us to continue to provide programs, accommodation and inclusion for people with intellectual disabilities.

Whether large or small, every gift will make a significant impact.



The impact that your gift will make

By making the decision to leave a gift in your Will, you will be helping to ensure the long-term sustainability of Bayley House. Still today, 50% of people with intellectual disabilities are chronically lonely.

Every day, people with disability are stigmatised, marginalised, underfunded and excluded from communities.

Recent studies continue to show that people with disability are significantly more likely than their non-disabled peers to report loneliness, low social support and social isolation and to report exposure to low social connectedness.

Your gift can help Bayley House change this experience as we strive towards our vision for full and enriched lives for all people with intellectual disability.

All gifts in Wills to Bayley House will be directed to the Bayley House Foundation. The Foundation, established in 1999, has the purpose of building the corpus of funds available for the future of Bayley House, whilst also contributing to major projects for the benefit of our clients. Your gift will be strategically invested in perpetuity, to ensure that it continues to grow and remain with Bayley House until required. Therefore, your gift will leave a long-lasting legacy for people living with intellectual disability.

Peace of mind

Nearly one in two Australians do not have a valid Will. Making a Will is a way to show that you care about family members and friends that you love, and those who have been important to you. It reflects who and what is important to you.

Creating or updating your Will can give you peace of mind, knowing your special wishes for loved ones have been made clear and that you've made provision for them.

A legal Will can also avoid confusion that may arise from time to time. Things such as favourite items and family mementos can be bequeathed through special notes contained in your Will. Without a Will, the legal processes used to distribute your assets can be lengthy and expensive.

We understand just how significant, and personal, decisions regarding your Will are and encourage you to look after your loved ones first. If, during this process, you wish to include Bayley House, you will be directly supporting people with intellectual disabilities for years to come.

The decision to leave a gift in your will of any size is a powerful way to continue to make a difference to Bayley House and the lives of people with disability in the future, at no cost to you today.



How to leave a gift in your Will to Bayley House

A gift in your Will to Bayley House can take many forms, including:

- the residue of the estate (residual gift is a portion of your estate, or the balance remaining after loved ones and expenses are provided for).
- a specified amount of money
- a percentage of your estate
- a nominated asset such as shares, real estate, works of art or jewellery

To ensure that your wishes are upheld, and Bayley House receives your gift, please include this wording.

"I give free of all duties or taxes...

[Please insert here the appropriate statement selected from the six options below:]

- *the whole of my estate*
- *[insert number] percent of my estate*
- *the residue of my estate*
- *[insert number] percent of the residue of my estate*
- *the sum of \$ [insert value of your gift]*
- *[Details of specific asset – such as shares or property]*

...to The Trustee of the BAYLEY HOUSE FOUNDATION (ABN 51 874 696 682) for its general purposes. The receipt of an authorised officer for the time being of The Trustee of the BAYLEY HOUSE FOUNDATION shall constitute a full and sufficient discharge of my executor's duties.

Our commitment to you

We recognise that leaving a gift to Bayley House in your Will is a significant decision and one that we want you to feel completely comfortable with.

At Bayley House:

- 1.** We will always respect your privacy in recognising and appreciating that your Will is completely personal to you. If you feel comfortable, we would love for you to let us know if you have left a gift in your Will to Bayley House. Often, sadly, we don't know about a gift until an individual has passed away. This means we don't get the opportunity to thank them and show the significant impact that their gift will have.
- 2.** We will work with all parties handling your gift with care, sensitivity and respect to ensure your wishes are met.
- 3.** We realise that, your family and loved ones will always come first.
- 4.** We recognise circumstances change and you may remove Bayley House from your Will at any time.
- 5.** We will invest your gift responsibly and ensure that it is utilised only in accordance with your wishes.
- 6.** We would welcome you to join our Bayley Bequest Society of like-minded individuals who have made the very generous decision to leave a gift in their Will to Bayley House. Joining this group allows Bayley House to thank you in your lifetime for your support and ensure your contribution is forever acknowledged.
- 7.** We will completely respect your wishes in regard to how you would like to be communicated with or acknowledged. We respect that many individuals may wish to leave a gift anonymously with no public recognition and limited communication with Bayley House.

The top three myths of leaving a gift in your Will

Creating or changing a Will is expensive and complex

There are now many options to create or update your Will which make it affordable and as simple as possible. Visiting a solicitor to assist with this process can help and they should have the expertise and experience to make this a smooth process.

If you feel comfortable, you can also now create a legally binding Will online for free.

If you have any questions at all about creating or updating your Will, please get in contact with Bayley House as we have relationships with solicitors and online Will writing websites to help you.

A small gift in my Will won't make an impact to Bayley House

Even 1% of your estate can make a significant impact to the lives of many people with intellectual disability. The fact that your gift will then be responsibly invested through the Bayley House Foundation means that it will grow over time to have an even greater impact. Every gift that Bayley House receives is sincerely appreciated and will make an impact.

I have to choose between my family and Bayley House

We will always encourage people to look after their loved ones first. Once you have included your friends and family, we would appreciate any consideration to including even a small percentage to Bayley House. Furthermore, by leaving a residual gift to Bayley House, this means that this will only be drawn from your estate once your loved ones and expenses have been taken care of.







“The history of Bayley House is the story of people with a dream, who worked step by difficult step to achieve it, always with the knowledge that more was needed.”

CATHERINE WATERHOUSE (2001)

You can be a part of the future

If you have any questions or would like more information on leaving a gift in your Will to Bayley House, please contact the Fundraising team at fundraise@bayleyhouse.org.au

Your legacy is our future

If you have already left a gift in your Will, are considering doing so, or would like more information, please complete this form and return it to the address below.

We are here to help and support you however we can and appreciate any interest that you have in supporting Bayley House.

PRIVATE AND CONFIDENTIAL

Title: _____

First name: _____

Surname: _____

Address: _____

Phone number: _____

Email address: _____

Please tick the appropriate box:

- I have already included a gift in my Will to Bayley House
- I intend to leave a gift in my Will to Bayley House.
Please contact me for a confidential discussion
- I would like more information about leaving a gift in my Will to Bayley House

Please cut off this form and return to:

Director of Philanthropy and Fundraising
Bayley House
PO Box 113
Brighton VIC 3186





Bayley House
PO Box 113, Brighton VIC 3186
fundraise@bayleyhouse.org.au
03 9982 1500

bayleyhouse.org.au