

# YOUR WILL CHECKLIST

Here's a quick checklist of the seven most important points you need to consider when it comes time to write or update your Will

## 1 What do you have to leave behind?

It is a good idea to start by making a list of what you own – this is known as your "Estate". This will give you a good idea of the total value of your Estate, which you will be able to share amongst the people and causes you care most about. (the "beneficiaries").

You don't need to be wealthy to leave a Gift, any amount is appreciated and will be used by the charity to help family life carry on.

## 2 Which people and causes would you like to include in your Will?

Ensuring your family and friends are taken care of after you've gone is an important consideration and it may be helpful to make a list of the people you wish to include in your Will.

You may also want to consider any causes or charities that are close to your heart that you would like to support. It is very important to start a conversation with your friends and family about your wishes to help limit any misunderstandings about your legacy.

## 3 How do you want to divide up your Estate?

Decide what you'd like to leave to each of the people and charities on your list of beneficiaries. There are different types of gifts you can include,



A Pecuniary Gift



A Residual Gift



Whole of Estate



A percentage Gift



A Specific Gift

## 4 Have you found a Solicitor to write or update your Will?

Your Will is one of the most important legal documents you should have. Getting it right is important – if it's not written properly it can cause issues and problems at a time that can be very stressful for your family and friends.

## 5 Have you asked your Solicitor to include a gift to Ronald McDonald House Charities in your Will?

It's simple to include a gift to Ronald McDonald House Charities in your Will. Just decide what type of gift you'd like to include and ask your Solicitor to use our correct legal name and ABN, Ronald McDonald House Charities Trust (ABN 26 037 589 412).

## 6 Have you updated your Will to reflect any major changes in your life?

Whenever there is a significant change in your life, you should think about updating or revising your Will. For example, consider updating your Will if you've recently:

- Changed your wishes
- Lost your spouse, partner or family member
- Married, divorced, separated or re-married
- Had children or grandchildren
- Retired
- Acquired / divested property
- Come into some money or an inheritance
- Death of a beneficiary or Executor

## 7 Professionally drafted Wills v DIY Will Kits

While DIY Will Kits are affordable and readily available, they might not be the best for your personal situation. It is strongly recommended that you consult with a qualified Solicitor or a Trustee Company (such as the Public Trustee in your State) to ensure your wishes are correctly represented in your Will and are legally valid instructions.

To find a local Solicitor that practices in Will and Probate, contact the Law Society or Law Institute in your state or territory or your state Trustee Company (<https://publictrusteesaustralia.com/>).



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## Other things to consider

- Always name an alternative "Executor" and provide for discretion in your Will – just in case things change further down the track and the name of the charity or our location has changed.
- Encourage your Solicitor to contact us if they have any questions about how to include Ronald McDonald House Charities in your Will.
- Consider directing your superannuation and/or life insurance into your Estate as those items do not automatically form part of your Estate.
- It's a good idea to discuss important aspects about your Will with your family, friends and Executors. This is especially important if your decisions about how to divide up your Estate might come as a surprise to them. This way you can make sure your final wishes are carried out in the way you would like them.
- Make sure your Will is kept in a secure place that is easy to find and ensure your Executor knows where it is located. Should your circumstances change in the future, you can easily alter or update your Will.

## Suggested wording for your Will

Our suggested wording for your Will is outlined below. This short clause contains all the details of the gift you could leave to help support seriously ill children and their families through such a tough time.

General purpose gift:

*"I give... [please select from one of the following options for your type of gift and delete those that are not relevant]"*

... my entire estate

... XX percentage of my estate

... the rest and residue of my estate

... XX percentage of the residue of my estate

... the sum of \$XX

... XX from my portfolio of shares

... XX description of a specific item.....

..... to Ronald McDonald House Charities Trust (ABN 26 037 589 412) operating as Ronald McDonald House Charities Australia of 21-29 Central Avenue, Thornleigh, NSW 2120, for the general purposes of such entity.

I declare that a receipt from the treasurer or other proper officer of Ronald McDonald House Charities to the Executor(s) of this Will, will be evidence that the Executor(s) has discharged his/her/their duties in accordance with this clause."

Alternatively, you may wish to include:

"I GIVE AND BEQUEATH (\$ add amount) from my Estate, free of all duties, to RONALD MCDONALD HOUSE CHARITIES TRUST (ABN 26 037 589 412) of 21 -29 Central Avenue, Thornleigh in the State of New South Wales for its general purpose. I DECLARE that the receipt of its treasurer or other authorised officer shall be sufficient discharge to my Trustees or Executor.

IN THE EVENT that RONALD MCDONALD HOUSE CHARITIES TRUST has ceased to exist or has changed its name or has amalgamated with another organisation, my gift to them shall not fail but my Executor(s) shall pay it to the organisation that they consider most nearly fulfils the objects that I intend to benefit."

## Get in touch

Call us on **1300 307 642**  
or email [supporter@rmhc.org.au](mailto:supporter@rmhc.org.au)

For more information or to discuss your plans, please contact the Gift in Wills team direct at [leaveagift@rmhc.org.au](mailto:leaveagift@rmhc.org.au) and see [www.rmhc.org.au/leave-a-gift](http://www.rmhc.org.au/leave-a-gift) for more information.



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