

PREPARE A WILL

In Australia, anyone can prepare a Will if they are over 18-years old and deemed to be of sound mind.

For a Will to be valid it must be:

- Written down – you can't rely on verbally passing on your wishes
- Signed and witnessed by two people who aren't your heir or spouse.

Different states and territories may have different rules, so it's recommended that you check any relevant government websites before you start to make your Will.

To write your own Will you can:

- Read example Wills online to understand how to structure it and the appropriate language to use
- Download or purchase a DIY Wills kit
- Use an online Will service like our trusted partners safewill.com/oxfam or willed.com.au/oxfam
- Speak to a lawyer or professional if you have any questions about how to write your Will
- Visit the Public Trustee site for your state or territory to make sure that you understand the services available to you and what it means for life events such as marriage or divorce
- Be very specific in your instructions and careful to include as much detail as possible. This avoids the possibility of misinterpretation or your Will one day being deemed invalid (Oxfam can help you find someone to help you write your Will if clear communication is a concern for you)
- If you have a relative or business that is connected to you that you wish to exclude from your Will be very clear about this also
- File your Will somewhere safe but easily accessible for your loved ones if they need to access it at a later date. Leaving a copy with a solicitor or trusted professional is also a good idea
- Remember to update your Will every few years to reflect your circumstances

Are you helping a friend, family member or client include a gift for Oxfam in their Will?

Thank you for helping to make a Will that includes a bequest to Oxfam Australia. Please refer to our suggested wording or you can download our Will guide and Oxfam for further information. To make sure that your loved one or client's gift reaches us, please:

- Use our correct registered name: Oxfam Australia;
- Include our ABN: 18 055 208 636
- Include our address: 355 William St West Melbourne VIC 3003

If your loved one or client would like their gift to be used for a specific purpose, please contact our Bequests team on 1800 088 110 to confirm whether their wishes can be carried out.

A Will gives you the power to choose how your assets can benefit your loved ones and adding a bequest to Oxfam ensures you leave a legacy that benefits people all around the world. When preparing a Will we recommend you consult a legal advisor to ensure your Will is valid and sets out the way you want your estate to be distributed.

Wording for your Will

How you word your Will depends on the type of gift you'd like to leave and how you'd like your estate to be distributed. If you wish to leave a gift to Oxfam in your Will, the following wording is suggested:

"I give, devise and bequeath, free of all duties and taxes, * _____ to Oxfam Australia (ABN 18 055 208 636) of 355 William St West Melbourne VIC 3003 for its general purposes. An authorised receipt from Oxfam Australia will be a sufficient discharge for the executor(s) or trustee without seeing to the final distribution of the funds."

*Insert one of the following:

- The whole, or percentage (it can be 1% to 100%) of the residue my estate
- The whole, or percentage (it can be 1% to 100%) of my estate
- the sum of \$ (amount)
- (Details of a particular asset, such as shares or property.)

How do I update my Will?

If you have an existing Will and simply wish to update it to include a charitable gift to Oxfam, you don't necessarily have to rewrite your Will from scratch. You can choose to:

- Amend your Will by adding a section, known as adding a 'codicil' to your existing Will
- Choose to revoke the Will and write a new one
- Destroy your Will

Or when you visit your solicitor, take a copy of our wording (above) with you and they can simply update your existing Will.