



**Pioneer House**  
community caring for our aged

## **THE GIFT OF A BEQUEST**

Making a bequest is a satisfying and fulfilling way to contribute to a valued cause or institution. By making a bequest to Pioneer House you will have the knowledge and satisfaction that you are contributing to the care and lives of the residents of Pioneer House Aged Care.

### **What is a Bequest?**

A bequest is a provision in your will that names the recipient or partial recipients of your estates. Including a bequest in your will is simple and can be done when you make your will or it can be added with a codicil to an existing will.

In making a bequest to Pioneer House Aged Care you can specify an amount of money or a percentage of your estate, the remainder of your estate or other items of personal property such as shares and real estate.





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## How do I make a Bequest?

There are three forms of bequests:

**Percentage Bequest**, where a percentage of your estate is nominated.

*Example of wording: I bequeath (free of all duties).....% of my estate to Pioneer House Aged Care with the written acknowledgment of the Treasurer or other proper officer of Pioneer House Aged Care to be accepted by the executors as a full and complete discharge.*

**Residual Bequest**: where a bequest is made from the residue of your estate after all debts, taxes, expenses, and specific bequests have been paid.

*Example of wording: I bequeath (free of all duties) the residue of my estate to Pioneer House Aged Care with the written acknowledgment of the Treasurer or other proper officer of Pioneer House Aged Care to be accepted by the executors as a full and complete discharge.*

**Specific Sum**: where a specific sum is bequeathed.

*Example of wording: I bequeath (free of all duties) the sum of \$.....to Pioneer House Aged Care with the written acknowledgment of the Treasurer or other proper officer of Pioneer House Aged Care to be accepted by the executors as a full and complete discharge.*

Consult your legal advisor to ensure the correct wording is used and all your wishes are met.

### For more information:

Contact Pioneer House Aged Care on: **(02) 6378 1144** . Your enquiry will be handled completely confidentially.