

Charitable giving in your will.



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Supporting a charity or charitable cause in your will allows you to leave a wonderful legacy and will bring you the satisfaction of knowing you are providing for the causes most precious to you.

Getting started

Our dedicated team can help you choose the best way to give based on the size of your gift, the charities or cause you want to support and the impact you want to create.

Some people may choose to leave a gift in their will directly to their favourite charity.

While there is value in making a one-off gift directly to charities, we provide a service that delivers a much bigger impact for your chosen cause or charity with your gift over the long term. This is called 'giving in perpetuity'.

Giving in perpetuity uses a trust to provide ongoing financial support to your chosen cause or charity by investing your original gift and distributing the proceeds each year over the long term.



Our expert team is here to deliver on your wishes outlined in your will and make sure that selected causes, charities or projects maximise the ongoing impact of your donation.

You can give in perpetuity through our public foundation – the State Trustees Australia Foundation, or we can set up a private charitable trust for you.



To find out more about the State Trustees Australia Foundation, or to understand the best way to support your charity or charitable cause, call the Charitable team on **03 9667 6740** or email **charitable@statetrustees.com.au**

State Trustees Australia Foundation

Founded in 1994 as a perpetual charitable trust for all Victorians, The State Trustees Australia Foundation is a registered charity with the Australian Charities and Not-for-profit Commission (ACNC).

You can leave a gift to a charitable cause close to your heart through the State Trustees Australia Foundation. We then work closely with the charitable sector to fund important work for generations to come.

Select your chosen cause or charity

When leaving a gift to the State Trustees Australia Foundation you can choose your own cause or charity to benefit from your gift or you can select one of the focus areas carefully managed by our expert team.

The State Trustees Australia Foundation focus areas are:

- ✓ Improving the quality of life for older Victorians.
- ✓ Encouraging community participation for people with disabilities.
- ✓ Helping disadvantaged children to thrive.
- ✓ Addressing key mental health issues in the Victorian community.

Create a sub-fund in your name

Your gift can create a sub-fund in your name, or the name of your loved one, to ensure your legacy is shared with the charities that benefit from it each year.

Giving through a Private Charitable Trust

We can also create a private charitable trust that can be named after you or a loved one.

We often set them up for people who want to use their assets for something in particular, such as scholarships.

We carry out your charitable wishes using the income earned from your gift, while your gift is invested to continue your impact into the future.





Contact us

Talk to us about how we can help you feel confident that your financial and legal affairs are in good order.

www



You can make an appointment or find more information on our website: **statetrustees.com.au**

Call us



Telephone

1300 138 672
8.30am – 5.00pm
Monday – Friday

Write to us



Mailing address

GPO BOX 1461,
Melbourne,
Victoria, 3001

Visit us (By appointment)



If you would like to visit us in our Melbourne or Bendigo offices, please make an appointment first so that we can have a consultant available to help you.

Connect with us



@statetrusteesvictoria



@company/state-trustees



@statetrusteesvictoria