

CAPITAL FUND

HOW TO LEAVE A GIFT IN YOUR WILL TO THE OPERA AUSTRALIA CAPITAL FUND

Refer to this checklist to ensure that your intentions are clear and carried out according to your wishes.

1. **Consult your family and friends**

We encourage you to talk to the important people in your life about your legacy intentions for the Opera Australia Capital Fund.

2. **Decide on your gift**

There are several ways of remembering Opera Australia in your will after your loved ones have been provided for. These include, but are not limited to:

A percentage of your estate

This means that the value of your bequest to the Opera Australia Capital Fund will adjust over time according to any fluctuation in the value of your assets.

A fixed gift

This may be a specified monetary sum or another type of asset such as shares, art or real estate.

The residue of your estate

This is a gift of all or part of the value of your estate, once all your other commitments have been settled.

We especially encourage donors to make their gift to the Opera Australia Capital Fund **unrestricted** (see “Suggested wording” below), rather than specifying a particular purpose or activity. Such unrestricted gifts mean your generosity will support Opera Australia’s greatest needs as they change over time. If you are thinking about requiring that your gift should be applied for a specific purpose or activity of Opera Australia, we very much hope you will get in touch to discuss your ideas with us before making or changing your will.

3. **Speak to a professional**

Information provided on this website is for general guidance only. It is important that you seek expert tax and estate planning advice about your particular circumstances when writing or updating your will.

4. **Include this basic information**

Full legal name: Opera Australia Capital Fund
Address: 480 Elizabeth Street
SURRY HILLS NSW 2010
ABN: 40 186 103 326

5. Suggested wording

The following sample wording may be useful for general guidance. You may wish to take it to your solicitor when the time is right.

I give to Opera Australia Capital Fund Limited as trustee of the Opera Australia Capital Fund:

The sum of \$ _____

or

_____ % (a specific percentage) of my estate;

or

_____ % (a specific percentage) of the residue of my estate;

or

_____ (describe precisely the specific asset you wish to leave) free of all charges,

as a contribution to that Fund to be applied for its general purposes and I declare that the receipt of the Opera Australia Capital's Fund General Manager or other proper officer for the time being of the said trustee shall be a complete discharge to my executors/trustees in respect of that gift.

6. Amend an existing will

If you already have a will and the main provisions, including your marital status, are still current, you can amend it to include a gift to the Opera Australia Capital Fund by adding a separate document called a codicil. Speak to your solicitor for further advice on codicils.

7. Get in touch

Wills are a very personal matter and we understand if you would prefer not to inform us of your intended gift to the Opera Australia Capital Fund. However if you do let us know, you can be assured that any information you share with us will be treated in the strictest confidence. You will also be invited to an annual special event.

If you intend including the Opera Australia Capital Fund in your will, let us know by:

- returning a **Response Form**
- sending us a copy of the relevant section of your will, or
- sending us a letter of confirmation from your solicitor, or
- simply **contacting us** by e-mail (bequests@opera.org.au), phone or letter:

Neroli Hobbins OAM

General Manager
Opera Australia Capital Fund
+61 2 9318 8386

Postal address: PO Box 291, Strawberry Hills, NSW, 2012

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Confidential Response Form

Of the many ways to help Opera Australia, one of the most valuable is by leaving a gift in your will to the Opera Australia Capital Fund. Your generous act will help secure the future of the national opera company so that Australia's cultural life can continue to be enriched with exceptional opera.

You may wish to use this form to let us know about your intended legacy. Returning the form does not create a binding commitment but simply notifies us of your present plans so that we can respond appropriately.

Tick all that apply

- I am considering including a gift in my will to the Opera Australia Capital Fund
- I intend including a gift to the Opera Australia Capital Fund when I make, or next update, my will
- I have already included a gift in my will to the Opera Australia Capital Fund
- I would like to be contacted by the Opera Australia Capital Fund to discuss my plans. My preferred method of contact is e-mail phone
- I do not wish to receive further contact about leaving a gift in my will

Title: _____ Name: _____
Mr / Mrs / Dr etc

Address: _____

Postcode: _____

Phone: _____ Date: _____

E-mail: _____

If you would like to advise the approximate value of your intended gift in your will, please do so here:

Return this form in an envelope marked 'Confidential' to:
Neroli Hobbins OAM, Opera Australia Capital Fund
Reply Paid 291, Strawberry Hills, NSW, 2012
E-mail: bequests@opera.org.au

Phone: (02) 9318 8386