

**Making a Bequest**  
**to**  
**St Peter's Eastern Hill**  
**Melbourne**



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## **INFORMATION ABOUT BEQUESTS TO ST PETER'S**

This brochure has been prepared in answer to questions from a number of Parishioners about leaving a bequest to St Peter's. It is not intended to be used as a 'Do it yourself Will' kit. Rather, it points out the importance of having a current Will and indicates how you can include St Peter's in it.

Remember that, if you die without a valid Will, your estate will be administered in accordance with the law. This may not be in accordance with your wishes. So when making or altering your Will in any way, do seek the advice and guidance of your solicitor.

Wills are a means of providing for the continuation of your life's witness, caring for those you love, and for fulfilling your community responsibilities. Whilst suggesting that you might like to remember St Peter's in your Will, we recognize that family and other commitments may also have a claim on your estate. For many of us, although we may wish to give more while we are alive, this may not be possible, and a bequest is a way in which you can make a lasting contribution to the parish without significantly impacting your family and other beneficiaries.

Should you wish to include St Peter's in your Will, there are two basic forms of bequest of which you should be aware. A bequest can be either **UNRESTRICTED** or **RESTRICTED**. These terms are defined below.

An **UNRESTRICTED** bequest does not specify the purpose or intention other than that the bequest be available for use by St Peter's. However, current diocesan regulations mean that 16% of unrestricted bequests must go to the Diocese once the capital is drawn down into the Parish Accounts.

A **RESTRICTED** bequest arises when money is designated to be used for some specific purpose which a donor believes to be important: for example, a trust fund for the payment of assisting clergy and curates; for providing Vestments and Servers Robes; for Choral Scholarships; for the purchase and maintenance of Ornaments and Artworks for the church; or for some other specified particular purpose. Diocesan assessment is not payable on bequests that are restricted in this way.

However, it should be pointed out that it can be time consuming to administer many small specific bequests. With this in mind, you can direct your bequest to a special fund administered by the Parish Council in which your capital is kept in trust in perpetuity, with only the income generated being available for parish purposes. Such a provision avoids diocesan assessment on the amount of the bequest, and is an effective way for you to ensure that your bequest will continue to support the parish of St Peter's into the future. In effect, it enables you to continue a regular weekly offering for ever, even after you are dead.

If it is your desire that your bequest be directed to the work of St Peter's among the homeless, unemployed and others of the district living in poverty, then the bequest can be made directly to the St Peter's Charitable Foundation which was set up for these purposes.

Please feel free to discuss the various options with the Vicar, one of the Churchwardens, or with the Treasurer. The Vicar, at least, should be consulted before any more restricted bequest is contemplated. In addition, should you consider a more restricted bequest, an alternative should also be nominated at the time of making the bequest, perhaps by making a provision that a restricted bequest should revert to the general Preserved Capital Fund in case the more specific intention is impossible to fulfill.

### **The Handfield Club**

Those who indicate that they have made provision for St Peter's in their Will are automatically members of the Handfield Club. This club is named in honour of the Rev'd Henry Handfield, who was vicar of St Peter's from 1854 until his death in 1900. The Handfield Club is a small way in which the parish acknowledges the important contribution that bequests make towards ensuring the financial future of St Peter's. Members of the club meet once or twice a year for an informal lunch.

**A FORM OF BEQUEST**

**I direct my executor to pay .....% of my residual estate, or an amount of ..... dollars clear of all deductions (*delete as appropriate*) to:**

**The Anglican Church of St Peter's Eastern Hill,  
15 Gisborne Street  
Melbourne Victoria 3002**

**to be held by the Parish Council of St Peter's in a Perpetual Trust, with the income being made available for the general purposes of the parish.**

**OR**

**to be applied by the Parish Council of St Peter's for the purposes of**

.....

**OR**

**I direct my executor to pay .....% of my residual estate, or an amount of ..... dollars clear of all deductions (*delete as appropriate*) to:**

**The St Peter's Eastern Hill Melbourne Charitable Foundation for the relief of persons in necessitous circumstances, such as the homeless, unemployed and those of the district living in poverty.**

In each case, the following words may be added:

**AND I DECLARE that the receipt of a Trustee, Secretary, Treasurer or other proper officer shall be full and sufficient discharge to my executor for the payment of the said legacy and that my executor shall not be bound to see the application thereof.**