

Caring for the Future

My Bequest Intention

By leaving **Shepparton Villages a bequest in your Will, you are showing your commitment to excellence in Aged Care now and in the future.

If it is your intention to make a bequest to Shepparton Retirement Villages Incorporated, please complete this confidential form and return to the Planned Giving Co-ordinator in the envelope provided.

This is not a legal document. It simply serves as a way of us understanding and recognising your generosity.

I have already included **Shepparton Villages in my Will

I intend to include **Shepparton Villages in my Will

If you wish to provide us with the details of your bequest plans we thank you. This information helps us in planning for the future and it also enables us to acknowledge your gift.

My Bequest will be

- A percentage of my estate
- A specific dollar amount
- The residue of my estate or a percentage of the residue after the legacies are made
- Life insurance policies or annuities
- A specific item of value – real estate, shares, art collections and/or other capital assets

Please tell us about the item

- Please direct my gift to the area of highest need
- Please direct my gift to be used for resident care or activities
- Please direct my gift to any Capital Projects Program, for the purpose of building or upgrading facilities or the purchase of land for future development

Optional Information

The intended approximate amount of my Bequest is

\$ _____ or _____ %
of the residue of my estate.

Information about You

Full Name (include salutation eg. Mr / Mrs / Miss / Ms / Dr)

Postal Address _____

Suburb _____ Postcode _____

Date of Birth ____ / ____ / ____

Telephone - Home _____

- Work _____

Email _____

Spouse's Full Name (include salutation eg. Mr / Mrs / Miss / Ms / Dr)

Spouse's Date of Birth ____ / ____ / ____

Signature of Donor _____

Date ____ / ____ / ____

Signature of Joint Donor _____

Date ____ / ____ / ____

Thank you for naming **Shepparton Villages in your Will. We appreciate and want to celebrate your thoughtfulness and generosity. It is very important that you tell us whether or not we are able to recognise you by checking one of the following:

I give permission to Shepparton Villages to list my name as a planned gift donor in any recognition materials

I want my bequest intention to remain anonymous

If you have any further enquiries or wish to contact our Planned Giving Co-ordinator, please call (03) 5832 0800 or email bequest@sheppvillages.com.au.

Planned Giving Co-ordinator

Shepparton Retirement Villages Incorporated

P O Box 203, Shepparton, Victoria 3632

Website: www.sheppvillages.com.au

ABN 94 314 031 069 Association No. A0024266Y