



Your Community Foundation

Your Greatest Gift to Your Community

When everyday people leave a gift in their Will — whether large or small—it creates a ripple effect that benefits local communities for generations.

After taking care of your loved ones, even 1% of your estate left to Border Trust can make a meaningful difference in the community you cherish.

A bequest allows your values and commitment to creating positive change in your local community to live on, supporting local projects that address urgent needs and create lasting impact.

Leave a legacy that benefits your community for generations to come.

Border Trust was established in 2004 as our region's local Community Foundation. We connect donor generosity with local needs, funding life-changing initiatives. We invest your donations and distribute the earnings as grants to fund charitable projects that create positive change across our local region.

Your bequest ensures your values live on, supporting projects that enhance our region in the areas of:

- Community Connection & Wellbeing
- Disaster Recovery & Readiness
- Community Equity
- Community Leadership
- Climate Resilient Communities



A charitable bequest could be the most important gift you ever make

A legacy isn't only what you leave to the world ...

Ready to Make a Lasting Impact?

Bequests are gifts you make from your Will or personal trust. They can be gifts of cash, stock, real estate or other assets. Bequests allow you to support your community without affecting your current lifestyle; and if your situation changes, bequests are revocable during your lifetime.

Putting a charitable gift in your Will doesn't require much time. And it doesn't require a lot of money. Bequests of any amount can have an impact far greater and more lasting than you might expect.

Those who include a charitable bequest in their estate plans become immortalised to the causes, the organisations and the community they support.

'A society grows great when men and women plant trees whose shade they will never sit in.'

- Greek Proverb

You can give to your family and still give to your community.

How you choose to do it depends on your individual circumstances.

- Some people specify a percentage of their estate (say, 1%, 5% or 10% of the value)
- Some people specify a dollar amount
- Some leave a valuable asset (like stock or property)

... a legacy is what you give to the world.

Have an impact forever.

It's not the amount of your gift that matters. It's what happens later, once your bequest goes to work.

Your bequest is combined with other generous donations received by Border Trust and invested with care, so that it continues to grow in value.

Even the most modest of gifts will grow into a powerful engine for good.

Our commitment to you.

If you choose to make a gift to Border Trust, you can be assured of:

- **Privacy & Confidentiality:** We respect your decisions and all information you provide will remain confidential.
- **Local Impact:** We ensure your gift makes a lasting difference.
- **Communication:** We'll keep your family connected with the impact your bequest makes.
- **Legacy:** Your legacy is managed with care, sensitivity, and respect.

Ready to make a lasting local impact?

Including a **Gift in your Will** is simple. You can include it when you or your solicitor write your Will, or add an amendment to it. If you already have a Named Sub-Fund, include the specific fund name in your Will.



Stories of Local Giving and Lasting Legacies.

Pam's Legacy of Compassion for Children

A Lifelong Caregiver Giving Back to Her Community

Pam, a 76-year-old retired nurse, has spent her life caring for others. A widow and mother of three, she raised her family in the Border region alongside her husband, who was a dedicated high school teacher. With one of her children still living locally, and the others now in Melbourne and Shepparton, Pam has always maintained strong ties to her community.

After ensuring her family's needs are met in her Will, Pam has decided to leave a \$20,000 donation to Border Trust. Her passion for helping others has driven her to designate these funds specifically for charitable projects supporting children from disadvantaged backgrounds. Pam's contribution reflects her enduring commitment to nurturing the next generation, ensuring that children facing challenges have the resources and opportunities they need to thrive.

Through her gift, Pam's legacy of compassion and care will continue to touch the lives of young people in the Border region for years to come.

Jack's Commitment to Community

A Local Businessman Giving Back to His Roots

Jack, an 84-year-old retired small business owner, never married or had children of his own. Throughout his life, he ran a successful transport company in the Border region, and now, in his retirement, he remains an active member of his community, particularly through his involvement with a local service club.

While Jack has nieces and nephews, he has made the thoughtful decision to give back to the community that supported his business success. In his Will, Jack has bequeathed a house and a \$500,000 untaxed donation to Border Trust. His gift is a testament to his deep appreciation for the region that played a pivotal role in his life and career.

Jack's contribution will enable Border Trust to continue supporting a wide range of community needs, ensuring that his generosity positively impacts the lives of many for generations to come.



Kim and Brendan's Legacy of Community Support

A Young Family Investing in the Future of the Border Region

Kim (37) and Brendan (39) are a young couple who have recently returned to the Border region after spending 15 years in Melbourne. Both originally from the area, they left to pursue higher education and launch their corporate careers. During their time in Melbourne, they had two children, now aged 6 and 8, and after deciding to prioritise family and enjoy a lower cost of living, they moved back to the Border.

Kim now works in local government, and Brendan has established his own financial planning business from home. Inspired by the community involvement of their parents, who have always been active volunteers, Kim and Brendan are committed to setting a similar example for their children.

As part of updating their Will, they consulted a lawyer and decided to leave 1% of their estate to Border Trust. They have expressed a desire to support initiatives addressing homelessness and domestic violence in the region. While their primary concern is to ensure their family's needs are covered, they are excited about the potential impact that even 1% of their estate can have on the community.

Kim and Brendan's thoughtful planning and commitment to giving back will ensure that their legacy supports vulnerable individuals and families in the Border region, continuing the cycle of care and compassion that has always been important to them.

If you wish to leave a Gift in Your Will to Border Trust, this language may be helpful ...

A Gift for Unspecified Local Community Impact Initiatives

I give and bequeath to BT Community Foundation Ltd trading as "Border Trust" (ABN 34 111 519 012), ("Border Trust") free of all duties, [specific dollar amount / percentage of my estate / residue of my estate / specific asset], for its general purposes to support community initiatives across the Border Region, as determined from time to time by its duly appointed Board.

I declare that the receipt of an authorised officer of Border Trust will be a sufficient discharge to my Executors, and that my Executors will not be bound to see the application of this bequest.

OR

A Gift aligned to a Local Cause, Issue or Initiative

I give and bequeath to BT Community Foundation Ltd, trading as "Border Trust" (ABN 34 111 519 012), ("Border Trust") free of all duties, [specific dollar amount / percentage of my estate / residue of my estate / specific asset], to be used to support [broadly stated charitable cause, e.g., 'education programs,' 'health and wellbeing,' 'environmental sustainability'] across the Border Region, as determined from time to time by its duly appointed Board.

I declare that the receipt of an authorised officer of Border Trust will be a sufficient discharge to my Executors, and that my Executors will not be bound to see the application of this bequest.

BORDER **TRUST**
Your Community Foundation

Contact us at:

admin@bordertrust.org.au

02 6081 7201 | 0485 858 185

www.bordertrust.org.au