

Your Guide: remembering Epworth in your Will

Epworth
Medical
Foundation



For further information
visit www.emf.org.au
or phone (03) 9426 6132



www.emf.org.au



**Associate
Professor
Ron Dick**

As a Cardiologist at Epworth I've witnessed first-hand the impact of bequests. In particular, the generosity of our donors has allowed our hospital to purchase state of the art cardiology equipment including portable defibrillators to ensure our critical care teams can support patients with urgent heart problems, chest compression systems for patients experiencing cardiac arrests and a heart ultrasound to monitor the function of the heart. Having this state of the art equipment enables us to provide the very best care for our cardiac patients.

What is your legacy?

What will your legacy be after you're gone?

Who do you want to help?

What difference do you want to make?

My wife and I recently updated our Wills to reflect the birth of our son and, during that process, we also made the important decision to leave a bequest to Epworth.

Epworth is our hospital. In their short lives, both of our small children have turned to Epworth in times of medical emergency (and, for that matter, both of them were born at Epworth), and my wife and I have also sought treatments from Epworth specialists and surgeons on more than one occasion.

Donations and bequests have helped make Epworth into the great hospital it is today, and our family has directly benefitted from the generosity of those donors. Now we want to give back, and do the same for the patients of the future. We established a perpetual gift in our Wills that will fund an annual staff scholarship in our family's name.

This is an important legacy for us. My wife and I believe that Epworth truly does provide the best possible care for its patients, and we believe that in supporting advanced education and innovation at Epworth, we will be helping to ensure that this continues for many decades to come.

I hope that you find this brochure both practical and inspiring, and that you will give serious consideration to creating a legacy of your own with Epworth HealthCare.

Warm regards,



Scott Bulger
Executive Director
Epworth Medical Foundation





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Introduction to EMF

The Epworth Medical Foundation (EMF) raises essential funds to ensure that our patients receive the best possible care.

This means ensuring they're cared for in world-class facilities by leading specialists with access to state-of-the-art equipment, groundbreaking research and clinical trials, and that patients and their families are supported by a compassionate and highly skilled team.

Our generous donor community has been helping us to provide all of this since 1920, when Sir Aaron Danks, a plumbing and engineering manufacturer, donated the deeds of his two-storey brick house to the new Epworth hospital.

Today, philanthropy underpins our simple yet unwavering commitment to provide exceptional care to each and every patient we treat.

Why leave a Bequest

By making a gift to Epworth via your will, you can leave a legacy of care for generations to come. For example, recent bequests have directly purchased and funded:



State-of-the-art equipment

- > Laparoscopic ultrasound machines
- > Augmented reality microscopes
- > Rehabilitation equipment



Ground-breaking research

- > Epworth Sleep Centre
- > Lung cancer screening
- > Paediatric allergies research



World-class facilities

- > Funding of new surgical theatres
- > Redevelopment of our Intensive Care Unit
- > Upgrade of our Day Oncology Unit
- > Upgrading our Maternity Unit and Special Care Nursery



Scholarships

More than 150 perpetual scholarships to enable our staff to be their best and give our patients exceptional care.



Compassionate care

Accommodation support grants enable patients from remote and rural areas who face financial difficulties to stay in accommodation close to their loved ones.

Leaving a bequest at Epworth

When you leave a bequest to Epworth in your Will you can choose where, what and how your legacy will support patients today and in the future.

Where

Does an area of health hold a special place in your heart? Perhaps, for example, you or someone you love has experienced cancer or required cardiothoracic care. You can choose where to direct the funds from your Will towards those areas that matter the most to you.

How

Many donors choose to establish endowments as perpetual funds which allow the donor to support an area of care they are passionate about. These endowments can be named in your honour or in honour of someone you love.

Welcome to the Lockwood Society

When you leave a bequest to Epworth Medical Foundation, you are automatically invited to become a member of the Lockwood Society, a very special group of people who have also chosen to support us in this very significant way. Lockwood Society members receive:

- > Honour board recognition
- > Invitations to Lockwood Society lunches and events
- > Personal updates on Epworth's progress
- > A commemorative Lockwood Society pin
- > Assistance when needed at Epworth

Welcome to the Lockwood Society

We are proud to name Epworth's bequest society "The Lockwood Society," as a public acknowledgement of the long, dedicated and generous support that Bruce Lockwood and his family have given to Epworth, for four generations and 100 years.

Bruce's grandfather, Thomas, was on the founding committee to establish the Epworth Hospital, which opened its doors in 1920. Bruce's Father Ronald served on the Board of Management for several years as, later, did Bruce himself for 14 years, including two years as President.

In 1982, Bruce helped found the Epworth Medical Foundation, to encourage and increase philanthropic

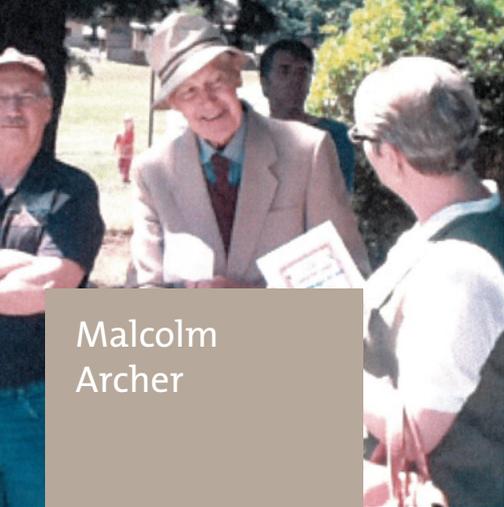
support for Epworth by raising funds to purchase new state-of-the-art equipment, world-class buildings and facilities, research, staff education, and patient support programs, ensuring our patients receive the best possible care.

In 2015, after a lifetime of giving to our hospital, Bruce passed away at his beloved Epworth at the age of 89. But he still had one last gift to give: Bruce made a bequest in his Will to establish the Lockwood Family Medal, distributing annual grants to outstanding doctors to further their education or spearhead important research, thereby ensuring that patients at Epworth would continue to benefit by receiving care and treatment from world-leading doctors.

"It gives me enormous satisfaction to know that when I am gone, my donation will help my family, and help to care for other people's lives as well. I feel great comfort that my legacy will make life easier for others in need."

– Bruce Lockwood





Malcolm
Archer

Malcolm Archer made a generous bequest to Epworth Medical Foundation in his Will, to support the purchase of medical equipment and fund advanced medical education at Epworth

Malcolm will be remembered forever at Epworth HealthCare for his generosity on behalf of our patients. The gift he left in his Will has been used to establish the Malcolm Archer Perpetual Equipment Fund, making it possible to purchase a range of vital new equipment for our hospitals, most recently including paediatric defibrillators.

In addition, his bequest was used to permanently endow four annual scholarships to further the development of our staff, fostering excellence and innovation which, in turn, will directly benefit our patients.

Establishing an endowment at Epworth

Increasingly, when people leave donations to Epworth in their Wills, many choose to endow their gifts to ensure their legacies continue in perpetuity.

An endowment creates a permanent legacy of care in your name or the name of a loved one, and it can be directed towards an area or activity of your choice.

An endowment is a very special gift – one that keeps on giving to our patients forever. We carefully invest each and every endowed gift we receive, and use the investment earnings to keep giving our patients world-class care every year thereafter.

Did you know?

When you establish an endowment with Epworth there are no administration costs so 100% of your gift is applied to the purpose for which you have given.

By establishing an endowment, your gift can support an activity or area of your choosing forever, leaving a lasting legacy of care for patients at Epworth. Some of the most popular areas endowments support include:

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State of the art equipment

Having the most advanced medical equipment and technology helps us to give our patients the best care. We rely on philanthropic funds to purchase more than a third of all new medical equipment.

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Research grants

Donations fund 80 per cent of more than 250 research projects into critical areas of health such as cancer, mental health, cardiac care and obstetrics underway at Epworth. The more we understand, the better we can care for our patients.

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Scholarships

Scholarships to enable our staff to be their best and give our patients exceptional care.

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We are more than happy to meet with you and discuss the options that are available to you. For a confidential discussion about making a gift in your Will contact **Vanessa Dannock** on 03 9426 6572, 0408 122 599 or email vanessa.dannock@epworth.org.au

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Innovation grants

Funding for innovative projects that pioneer future medical care, including new surgical techniques, equipment, technologies and treatment trials is made available through the Epworth Innovation Centre (EPIC).

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Doctor/registrars grants

Grants are awarded to outstanding doctors to enable them to undertake research or training, or to gain exposure to new techniques and treatments to bring to patients at Epworth.

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Compassionate care

Donations help to ensure the holistic care of our patients, because we understand that a return to health means supporting patients physically and emotionally.

.....

Mr James
Patrick 'Pat'
Polland



**The Polland Family Freemasons
Scholarship was generously funded
by Pat Polland via a bequest in his
Will to leave a longstanding legacy
of care for the greater community.**

Pat Polland was a caring, generous man, known in his community as someone who was always willing to help.

Born in the small rural community of Moyston near Ararat in 1926, he did very well at the local school despite a severe, long-lasting illness at the age of 10. While recovering he took up photography. He won many photography competitions and his photos were published in the Weekly Times.

As a grazier Pat ran a farm raising sheep, cattle and grain. He was always willing to help others in the

community, lending out machinery to his neighbours, and even fitting out a state-of-the-art fire-fighting unit at his own expense. He was an active member of the CFA, receiving multiple awards in recognition of his years of service.

The sale of the neighbouring farm changed Pat's life for the better. The family who purchased the farm soon became his 'adopted' family. They were very involved in each other's lives, with Pat even giving away each of the three daughters at their weddings.

Generous to the end, Pat left a long-lasting legacy at Epworth, donating his estate to Epworth Freemasons. His legacy will live on through the Polland Family Freemasons Scholarship to support Epworth employees to further their education and seek new opportunities to ensure the best possible care for patients.

How to structure a bequest

When you are ready to make or update your Will, speak with your solicitor about the type of charitable gift that will best suit you, your Estate and what you hope to achieve from your generosity.

Your options are limitless in terms of the legacy you can leave

There are five main ways to structure a gift to a charity in your Will:

1. **Whole estate** – Leave your entire estate
2. **Residual gift** – A residual gift includes the remainder of your estate, after you have first provided for your loved ones.
3. **Percentage or fractional gift** – Dividing your estate by percentage or fractions.
4. **Specific gift** – A simple way to donate a specific dollar amount, **property or assets**.
5. **Share Portfolio** – Donating your share portfolio or stocks to Epworth will not incur capital gains tax.

Suggested wording for your will

Based on your personal situation and preferences, the following wording may be used to make a bequest to Epworth HealthCare.

.....
“I give to the Epworth Medical Foundation, ABN 59 135 483 055

- > All of my residuary estate, **OR**
- > ____ percentage of my residuary estate, **OR**
- > The sum of \$ ____ **OR**
- > List asset or assets **OR**
- > Your share portfolio of stocks or shares

to be applied for the purposes of providing medical care, facilities, equipment or research at Epworth HealthCare by the Foundation.

I declare that the receipt of a Director of the Foundation or other authorised officer will be a sufficient discharge to my executors, who will not be bound to the application of this gift.”
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Free resources for planning your estate

Whether you already have a Will, or are yet to put your affairs in order, Epworth Medical Foundation is pleased to offer a range of resources to assist you as you make these important decisions:

- 30 minute Wills consultation with a Solicitor. This is a private conversation between you and a solicitor, to discuss how you want to care for those you leave behind, and the legacy you hope to create.
- Wills Planning Workshop. These popular workshops will help you learn from professional Estate Planners how to plan your Estate, and protect your legacy.
- Personal Affairs Record. Fill out this useful and important booklet and store it somewhere where your loved-ones, executor or solicitor can find it. In this book, you can record a useful summary of your life and assets, for those you leave behind.

Have you decided to leave a gift to Epworth in your Will?

We have several law firms who will help prepare a simple Will at no cost.

To be put in touch with one of these firms, simply tick the **“yes”** box on the attached coupon.

If you have made or would like to know more about making a bequest to Epworth in your Will, simply return this response form to us, indicating any resources or support you need.

- I wish to confirm that I have left a bequest to Epworth. Please send me my Lockwood Society Pack.
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- I am considering leaving a bequest to Epworth. Please contact me to discuss my options.
-
- I would like to make a bequest to Epworth Medical Foundation in my Will. Please put me in touch with a law firm who will assist me free of charge.
-
- I would like to book in for a free 30 minute personal Wills consultation with a Solicitor. Please contact me to arrange this.
-

All communications are made in the strictest of confidence.

Please return to:

Vanessa Dannock

Donor Relations Manager

Epworth Medical Foundation

Phone: 03 9426 6572 or 0408 122 599

Email: vanessa.dannock@epworth.org.au

Mail: Reply Paid 84307 RICHMOND VIC 3121

Epworth Medical Foundation

89 Bridge Road
Richmond VIC 3121 Australia

Phone 03 9426 6132

Fax 03 9427 9253

Email emfinfo@epworth.org.au

ABN 59 135 483 055

www.emf.org.au