



# A gift in your will

Help us build  
a foundation  
for the future



# From the Chair, Ballarat Health Services Foundation

For over 30 years, the Ballarat Health Services Foundation has had the privilege of supporting Grampians Health Ballarat with philanthropic funds. Bequests from generous donors have been amongst the most impactful donations we have received.

Ballarat Health Services Foundation was founded in 1989 as the community fundraising arm of Ballarat Health Services (now Grampians Health Ballarat). It provides both community fundraising and manages philanthropic funds exclusively for the health service. From humble beginnings, we now manage over \$5.7 million to help secure the future of healthcare in our community. All financial donations to the Ballarat Health Services Foundation are used exclusively by Grampians Health Ballarat to assist with the provision of equipment and patient care.

Over the years, these philanthropic funds have supported hundreds of projects to provide patient-centered-care equipment, research, and staff training and wellbeing programs. At the heart of our work is the commitment to help make our community healthier, stronger and a better place for us all to live.

As the main public referral health service for the region, Grampians Health Ballarat receives the majority of its funding through the State Government. However, we rely upon the generosity of our local community to help purchase state-of-the-art equipment and programs for our Health Service.

Please consider leaving a gift in your will to the Ballarat Health Services Foundation, after first considering the needs of your family and loved ones. Your gift to us is a commitment to exceptional public healthcare in our community.

Your gift will be carefully managed by the Ballarat Health Services Foundation. Every gift, no matter how large or small, makes a difference, both now and into the future.

Help us build a foundation for the future,



Lindsay Florence  
Chair, Ballarat Health Services Foundation



# About us



The Ballarat Health Services Foundation (ABN 86 007 199 037), of 1 Drummond Street North, Ballarat, is an independent body that is the official fundraising channel of Grampians Health Ballarat (formerly Ballarat Health Services).

The Foundation is managed by a Council which oversees donations and investments of philanthropic funds. The Council works closely with Grampians Health Ballarat to identify projects which would benefit from the Foundation's support.

Your bequest to the Ballarat Health Services Foundation would be prudently managed to provide patients with the best possible facilities, equipment, surgical expertise and access to research, long into the future.

Ballarat Health Services Foundation is a registered charity with the ACNC (Australian Charities and Not-for-profits Commission) and has Deductible Gift Recipient Status (DGR1). It is an organisational member of the Fundraising Institute of Australia.



*There are many reasons why people choose to leave us a gift in their will. Many are past patients who are grateful for the care they have received from across the multiple departments of our health service.*



# Why gifts in wills are important to your public health service

At Grampians Health Ballarat, we believe in equity of healthcare for all.

By making a gift in your will (a bequest) you are making a unique and lasting commitment to health care in our community.

Your gift will be used to deliver large transformational projects within the health service, or to provide innovative equipment and services, as quickly as possible, to projects with the highest need.

Our health service has a long and generous history of philanthropy, dating from the establishment of Ballarat Base Hospital in 1855. All gifts, large and small, help us deliver exceptional public healthcare to our community.

Our purpose is, and always will be, to ensure our community has accessible and comprehensive healthcare, right here in Ballarat, where we and our loved ones live.

## Join us

If you are considering leaving a gift in your will, please let us know.

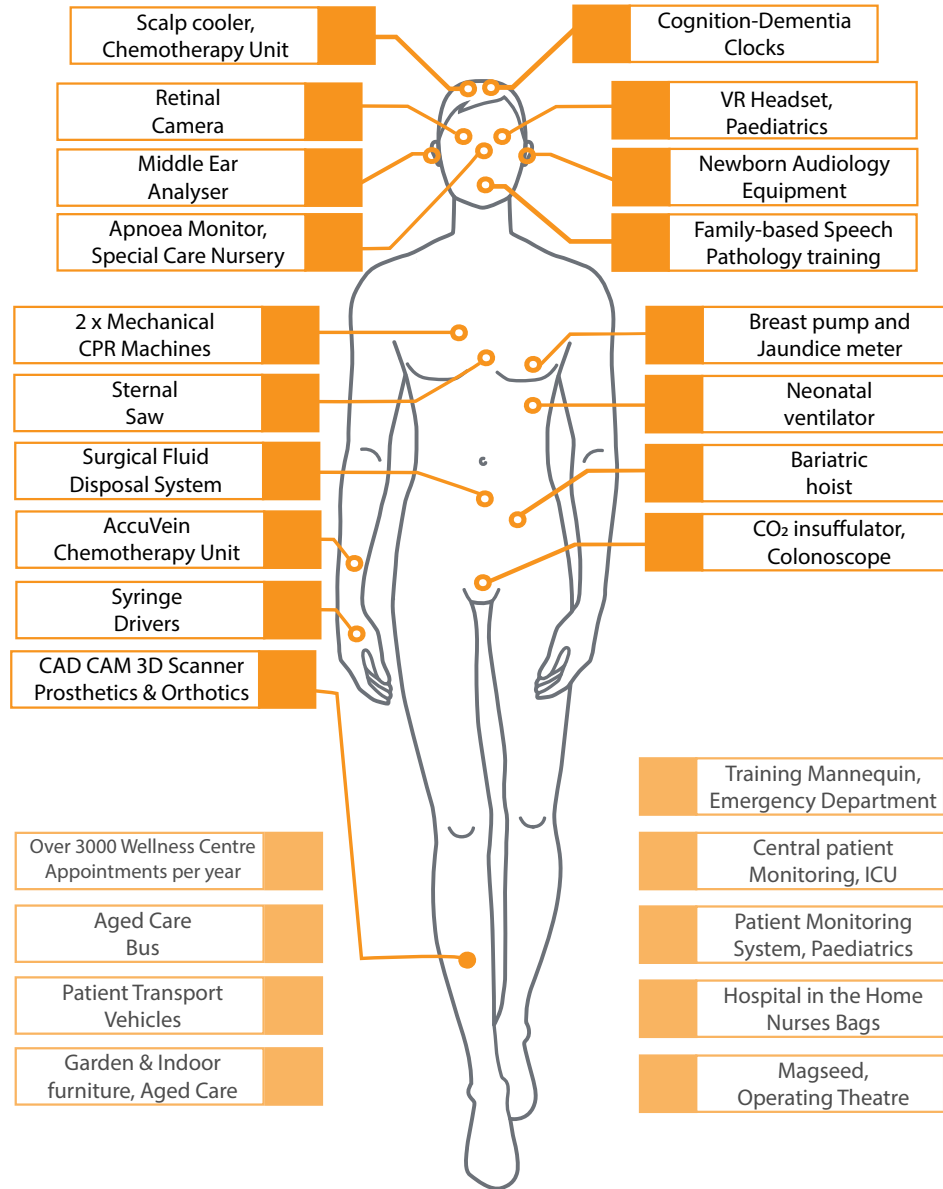
You are warmly invited to meet with the Ballarat Health Services Foundation to learn more about how your bequest would be used.

If you do choose to leave us a gift in your will, please allow us to acknowledge you, in your lifetime.

*“Major gifts transform those who give and even their children and future generations.”*



# How philanthropy supports your public health service



# Transforming breast cancer through two special gifts

Shirley and Jim Richards on their wedding day,



Dr Bollard and Andrew Byrne (BJT Legal) and the Magseed device.

## **Breast cancer research: Edna Veitch Bequest**

## **Breast cancer treatment: Shirley and Jim Richards Bequest**

Edna Daisy Hope Veitch was born in Smokeytown, outside of Creswick, and was the daughter of farmers. She died when she was 100 years old. For 21 years she worked at the Queen Elizabeth Home of Ballarat Health Services. In her will, she left a residual gift specifically for cancer research.

Ballarat Health Services (now Grampians Health Ballarat) were determined to maximise the reach and benefit of this generous gift, and created the BHS Cancer Research Grants Scheme. This scheme ultimately funded three cancer research projects.

One of these projects, in research led by Dr Ruth Bollard, examined the detection and biopsy of breast lesions using SentiMag device (Magseed). These lesions are often too small to be felt or located using traditional methods, and is much less invasive procedure. The successful results of Dr Bollard's research trial led to the purchase of a Magseed using a generous bequest from the Estate of Jim and Shirley Richards (managed by BJT Legal).

Ballarat Health Services were the first in regional Victoria to use this device.

*“Jim and Shirley both wanted funds to come into Ballarat, to be used for Ballarat purposes. They both received good care and attention through medical areas in Ballarat and were keen to make sure it came back for appropriate uses within the cancer and research areas.*”

*“I know they would be delighted that their bequest is being put to such great use.”*

Andrew Byrne, BJT Legal

# A gift of an active life

John Thompson is a father, grandfather and keen golfer. Semi-retired, he works in his sons' business and plays golf three times a week.

In late November 2019, on the day before his 69th birthday, John's lower right leg was amputated. By Christmas 2019, he walked on his first prosthetic leg. In March 2020, he played his first game of golf since his surgery.

Thanks to a philanthropic gift to our Prosthetics and Orthotics Department we were able to purchase a CAD CAM Scanner. This equipment was used to scan John's stump to create a 3D image. This image was then used to create a custom-made prosthesis for John.

"Initially, I had two prosthetic legs made. My prosthetist, Catherine, gave me a blind test, to see if a leg made using the traditional plaster-cast method or using the CAD CAM scanner was a better fit. Without a doubt, the prosthesis created using the CAD CAM Scanner was much more comfortable. When this new leg is combined with a vacuum seal, I have no movement between my leg and the prosthesis, which means no blisters, and a leg which has allowed me to return to the active lifestyle that I love."

The CAD CAM Scanner is used for patients who need braces, such as children with cerebral palsy, for people like John, who have had a lower leg amputation, or babies born with a misshapen heads, The scans are then used to help make braces, orthotics and prostheses.

Philanthropic gifts help us purchase the latest technology equipment, like the CAD CAM Scanner, so we can provide our patients with devices with the best possible fit and function for their needs.

John's first day with his new prosthetic leg.



A gift in your  
will creates a  
legacy of human  
kindness.

# Bequest Charter

## WE APPRECIATE THE SIGNIFICANCE OF YOUR DECISION

A gift in your will is a gift like no other and it is made only once in a lifetime. It will ensure our community has accessible and comprehensive healthcare.

## WE UNDERSTAND THAT THIS IS A DEEPLY PERSONAL DECISION

We encourage you to consider the needs of your family first and to discuss your decision with them.

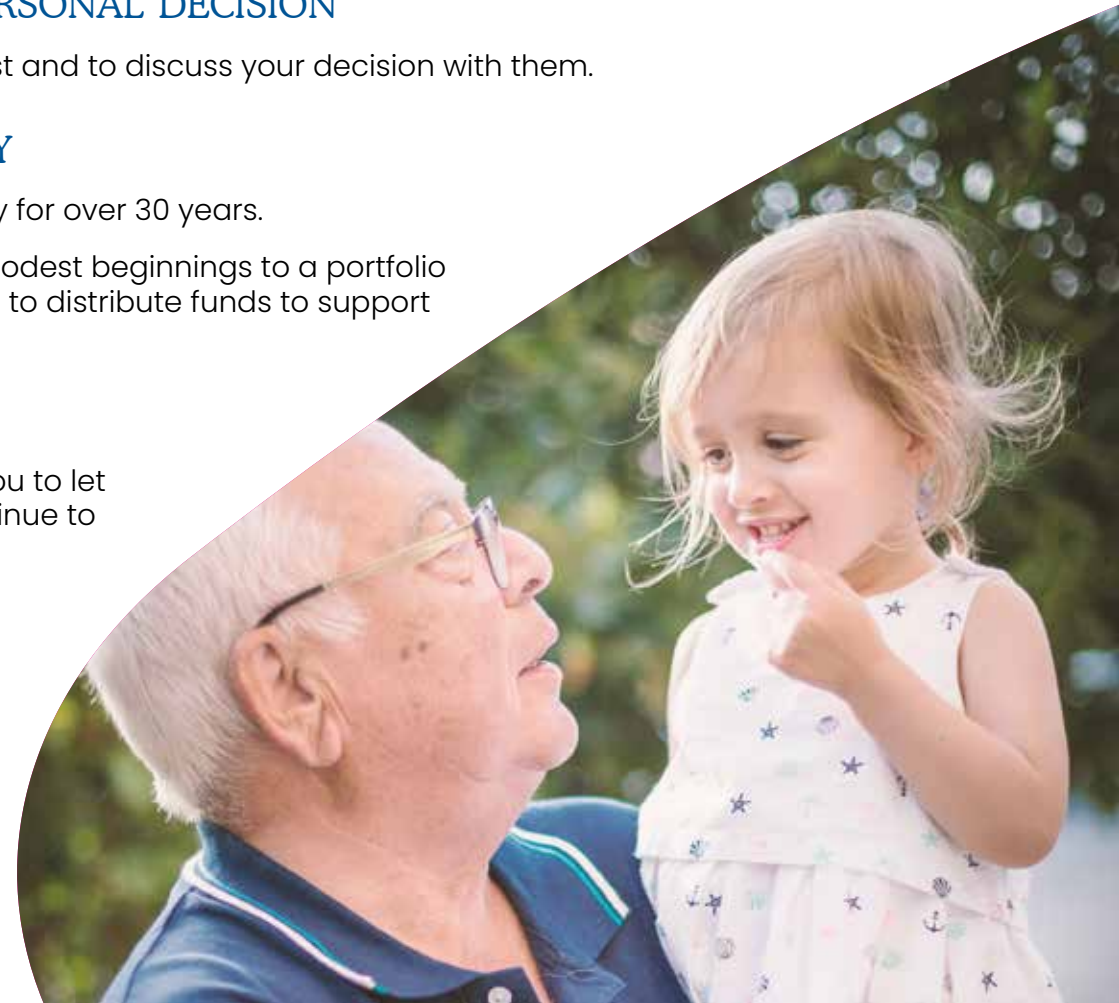
## WE WILL ENSURE YOUR GIFT IS USED WISELY

The Ballarat Health Services Foundation has invested wisely for over 30 years.

We have grown our portfolio of philanthropic funds from modest beginnings to a portfolio worth over \$5.7 million. During this time, we have continued to distribute funds to support projects throughout the health services.

## WE WILL THANK YOU AND REMEMBER YOU

If you decide to leave us a gift in your will, we encourage you to let us know so we can thank you within your lifetime, and continue to acknowledge you into the future.





# Every gift, whatever the size, makes a difference

There are different ways of including a gift to the Ballarat Health Services Foundation in your will. Your solicitor can provide the best advice for you.

1

## A residuary gift

After making provisions for your friends and family, you can choose to leave all or part the remainder to the Ballarat Health Services Foundation.

2

## A percentage gift

You can leave a nominated percentage, from 1 – 100% of your entire estate.

3

## A specific item

You can leave specific items, such as shares or real estate.

4

## A set amount

You can leave a specific sum of money. If you would like your gift to retain its value over time, you can ask your solicitor to index-link it.

If you would like your gift to retain its value over time, we suggest you consider a residuary or percentage gift. These are less affected by inflation.





Your gift will help us provide  
world-class healthcare,  
here, always.

# Steps to leaving a gift in your will

## STEP ONE

Decide on the family, friends and organisations you would like to include in your will. Discuss your decision with your family and share your wishes with them.

## STEP TWO

Choose the type of bequest you would like to make - a residuary gift, a percentage gift, a specific item or a set amount.

## STEP THREE

Choose if you would like your gift directed to a particular purpose in the health service.

- A gift to the Foundation is a gift for the future of healthcare in Ballarat. We will invest your gift and use it to support projects of the highest need or as part of large, transformational projects within the health service.
- Alternatively, you may choose to direct your gift to a specific department. For example cancer care or the Children's Ward.

## STEP FOUR

Visit a solicitor to have your will written or updated with a codicil. You may also choose to use an online will service.

The preferred wording for including a gift to Ballarat Health Services Foundation is:

I give [Amount (in dollars or percentage (\$## or ##%))/residue/ specific item] to BALLARAT HEALTH SERVICES FOUNDATION LIMITED ABN 86 007 199 037 ("Ballarat Health Services Foundation") and I declare that the receipt of the proper officer for the time being of Ballarat Health Services Foundation shall be good and sufficient discharge to my Trustee/s.

If you choose to give to a specific department or purpose, please consider including the following provision:

If at any time Ballarat Health Services Foundation determines that it is impossible or impractical to fulfil the purpose of my bequest, the Foundation may apply the bequest for a related purpose that will most closely align with the spirit and intent of my bequest.



# Frequently Asked Questions

## Why do I need a will? I don't have a lot of money.

Having a will ensures that your final wishes are understood and respected. If you do not have a valid will when you pass away, state laws will determine who your estate is administered and distributed.

It is easy to underestimate the value of your estate, particularly if you own real estate. You should review your will regularly particularly if your personal circumstances change, such as marriage, divorce, bought or sold property, retired or if an intended beneficiary or executor has died. You may wish to direct your superannuation or life insurance into your estate, as these do not automatically form part of your estate.

Writing a will does involve making important decisions. It is important that you discuss these decisions with your loved ones, and ideally, an independent legal advisor.

## I'd like to leave a gift but I need to look after my family.

Your first priority will always be your family and loved ones. We encourage you to consider them first, and should you wish to leave a gift Ballarat Health Services Foundation, to discuss this decision with your loved ones.

## Why should I leave a gift to Ballarat Health Services Foundation?

Leaving a gift in your will is an opportunity to give back to organisations that are important to us, without affecting daily finances. It can be a profound way to recognise your connection to our health service and to help support its life-giving work, for generations.

A gift in your will to Ballarat Health Services Foundation helps us build on our strong foundation for equitable, accessible healthcare into the future. Your gift will be prudently managed by the Foundation council, and income generated by these managed funds are allocated throughout the year to support projects of the highest need or large projects which require significant funding assistance.

Every gift, no matter how small, will make a difference to the provision of exceptional public healthcare in Ballarat.

## Can I direct my bequest to a particular area of the health service?

Yes! Many people wish to acknowledge a particular department of the health service for the exceptional care they or a loved one have received. We will ensure that your wishes are respected and all funds are allocated as requested.



## Do I need a solicitor to write my will? Can you help me?

We recommend you use a solicitor or an accredited wills and estate specialist (these may be online). These people have the necessary experience, training and qualifications to provide you with sound advice, to ensure that your will is legal and valid, and that your wishes will be acted upon as intended. Encourage your solicitor to contact us if they have any questions.

## What is the difference between a cash sum and residual gifts?

A donation of a cash sum is a set amount of money which decreases in value over time, due to inflation. A residual gift, often a percentage, will retain its value over time. The value of a residual gift is determined when your estate is being finalised.

## I've already made my will, but would like to support Ballarat Health Services Foundation.

You can easily amend an existing will to include a gift to Ballarat Health Services Foundation by asking your solicitor to prepare an additional page (a codicil) that has been signed and witnessed.

## Do I need to tell you that I have included a gift in my will?

You are under no obligation to tell us of your intention to leave a gift in your will. However, notifying us allows us to thank you for your gift and recognise your generosity in your lifetime. We will always treat any information you provide us with the highest levels of confidentiality.

*“You don't have to be rich or famous to make a difference. You just have to make a simple decision. Whoever you are, whatever your situation, you can help create a better world by including a charity in your will.”*

Include a Charity





# A lasting gift to build a foundation for the future



- I have already included a gift in my will to Ballarat Health Services Foundation.
- I intend to leave a gift in my will to Ballarat Health Services Foundation.
- I am interested in leaving a gift in my will. I prefer to be contacted by:
  - Phone
  - Email
  - Mail

## Contact Details

Title: .....

First name: .....

Last name: .....

Post nominals: .....

Address: .....

Suburb: .....

State: ..... Post code: .....

Phone: .....

Email: .....

Privacy statement: Grampians Health Ballarat and the Ballarat Health Services Foundation respects your privacy. Personal information collected through this form is used to provide you information and to keep you up to date with how donations make a difference to Grampians Health. You can change your communication preferences by contacting us at fundraising@gh.org.au or 03 5320 4093.

## Getting started

A member of the Ballarat Health Services Foundation team can provide confidential advice and information. They will ensure that making your bequest is a straightforward and rewarding experience, and will answer any questions you may have.

## Contact Us

Grampians Health Ballarat  
Fundraising & Ballarat Health  
Services Foundation

Phone: 03 5320 4093

Email: fundraising@gh.org.au

Postal Address:  
PO Box 577, Ballarat VIC 3353



# Thank you

**For helping us build a foundation for the future.**



**Grampians Health Ballarat & Ballarat Health Services Foundation**

Fundraising & Engagement | PO BOX 577, Ballarat, VIC, 3353 | [fundraising@gh.org.au](mailto:fundraising@gh.org.au) | 03 5320 4093

