



Giving in your Will

By making a gift in your will to St Stephens you can have the satisfaction of knowing that into the future you remain part of the work in Jesus' name here in the Forest.

When you leave a gift to St Stephens, small or large, it can finance things outside the general budget and be applied to missions or outreach programs, vital church building or equipment, and other "wish list" items. Please consider including St Stephens in your will and your gift can become an ongoing expression of your love for the people and mission of St Stephens, and the work of Christ in this area.

The Wardens have been given the following advice by Diocesan Legal Services in May 2017 about appropriate wording to include in wills making a gift to the parish. It is the church's preference that wording in a will not specifying what the gift money can be spent on, as circumstances can change over time, the Wardens are obliged to respect the terms of any trust, and the money may not be able to be used where it is most needed at the time.

The following wording could be included in a will for the purposes of making a testamentary gift for the general purposes of a particular Anglican church –

"To the wardens for the time being of [insert full name of Anglican Church- i.e. St Stephens Anglican Church Belrose, Diocese of Sydney] to be applied for such purposes of the parish in which the church building is situated or any ecclesiastical district into which it may subsequently form part as may be determined from time to time by a majority of the parish council of the parish. The receipt by any two (2) of the wardens shall be a sufficient discharge for my executors."

Where the proposed gift is more than \$20,000, consideration should be given to making the gift to the ACPT, the corporate trustee of the Anglican Church, to be held in trust for the purposes of the particular Anglican Church. The ACPT, as corporate trustee, has wider investment powers than the wardens and this may be of particular relevance where it is intended that a gift be used to create a fund for investment. The wording of such a gift could be as follows –

"To the Anglican Church Property Trust Diocese of Sydney to be applied for such purposes of the parish of [insert parish name] or any ecclesiastical district of which it may subsequently form part as may be determined from time to time by a majority of the parish council of the parish. The receipt by the Secretary of the Anglican Church Property Trust Diocese of Sydney will be a sufficient discharge for my executors."

A gift may be made for a more specific purpose – for example, a testator may wish that a gift be made for the purposes of building repairs, maintenance, improvement or replacement. In such a case, the gift could be expressed as follows –

"To the wardens for the time being of [insert full name of Anglican Church] to be applied for such purposes of repairing, maintaining, improving and/or replacing the church building in the manner determined from time to time by a majority of the parish council of the parish in which the church building is situated. The receipt by any two (2) of the wardens shall be a sufficient discharge for my executors."

A gift for specific purposes in excess of \$20,000 could be made to the ACPT, as per the second option above.

If you would like to confidentially talk about your proposed gift in your will please contact the Rector's Warden (the Church office can give you contact details)."