

# WILLS AND BEQUESTS

LEAVE AN  
EXTRAORDINARY  
LEGACY GIFT



habitat forever

For over 50 years, Trust for Nature has worked alongside Victorians to create a future where our native plants and animals can be valued, protected and thrive. As one of Australia's oldest conservation organisations, we have unique powers enshrined in legislation to protect Victoria's natural wonder forever.

By making a bequest to Trust for Nature, you will leave a legacy that will last forever.



This page: Trust for Nature Senior Project Officer John with landholders Mohya and John at their covenant near Corner Inlet, Gunaikurnai Country. Photo by Annette Ruzicka.

Cover page: Trust for Nature Conservation Program Officer Bianca with landholders Don and Christie at their covenant near Heathcote, Taungurung Country. Photo by Annette Ruzicka.

In Victoria we live among an extraordinary variety of nature, from lush forests in the east to deserts in the west; from snow-covered mountains to spectacular coasts. While we're fortunate to have wonderful public reserves and national parks, these aren't enough to ensure the health and survival of our environment.

Two-thirds of Victoria is privately owned, so protecting, managing and improving habitat on private land can make a huge contribution to safeguarding nature – now, and for future generations. Many animals and plants depend on habitat that is found mostly on private land. These precious patches that we live among are vital for keeping our air and water healthy, and helping fight the effects of climate change.

Vast areas of these natural habitats are under threat from land clearing, overharvesting, changing climate and population growth. Without the land that provides their homes, species become extinct.

**We must urgently scale up the pace of our protection and restoration efforts to protect the quality and amount of native habitat in Victoria forever.**

That's why Trust for Nature is committed to permanently protecting, conserving and regenerating private land in Victoria – so we can create and sustain a healthy and vibrant landscape.

**Our work is only possible thanks to the generosity of people like you.**



## A continuous cycle of investment in nature

When Laurie Macmillan and David Wakefield found their property at Strath Creek, Taungurung Country, it had been degraded by grazing and had little remnant native habitat. Not to be daunted, they set about restoring the land into a wildlife haven.

Years of weeding, tree planting and progressively excluding cattle transformed the 41 ha property, more than half of which Laurie and David protected under a conservation covenant in 2015, ensuring their hard work is protected forever.

That would itself be an incredible legacy to leave behind, but Laurie and David also generously decided to bequeath the property to Trust for Nature. Sold through the Revolving Fund, the proceeds will return to the fund and be used to purchase more land vital for securing the future of Victoria's wildlife, creating a continuous cycle of investment.

Now that legacy will pass on to the next generation of landholders.

We all have something of value to leave behind which can be put to positive use in the world in the future.



This page:

Laurie Macmillan and David Wakefield generously bequeathed their property in Strath Creek to Trust for Nature.

The Southern Greater Glider is one of the threatened species protected through conservation covenants. Photo by Ben Williams.

Next page: Landholder Sally Chapman generously decided to bequeath her covenanted property to Trust for Nature. Photo by James Henry.

## A future for wildlife

When Sally Chapman discovered her 24 ha property in Victoria was home to the Greater Glider, a species at risk of extinction, she began to consider the legacy she would leave.

“I thought, what is my responsibility to protect the native plants and animals if I think of myself as a custodian of the land as opposed to an owner? A bequest is a really good safeguard for the environment.”

It was with that in mind that she generously decided to bequeath the property to Trust for Nature. Sally’s gift will ensure that wildlife like the Greater Glider have homes to live in forever by safeguarding habitat on private land.

Leaving a bequest, Sally says, is an opportunity to consider her values and how she might leave a legacy beyond her family.

“There’s a great conversation around what are the assets that any of us hold right now and how can they be distributed differently,” she says. “If people have really clear values, a Will is a really powerful way to bed that down.”

“A charitable bequest lets my children and grandchildren know that my caring about their wellbeing included the future work of this organisation.”



## Why choose Trust for Nature for your charitable bequest

Nature is not only essential to the existence of life, nature gives us the gifts of beauty, wonder, recreation and enjoyment. With its many gifts given to us freely, we have both the pleasure and the responsibility of handing it on to future generations.

Looking after our natural wonder doesn't just happen. It takes management, commitment and care.

It's up to each one of us to commit to the conservation of nature during, and even after, our lifetime.

Since its inception, Trust for Nature, with the help of our wonderful supporters, continues to be a major protector of Victoria's special places, plants and animals.

Among these are our wetlands, woodlands and unique volcanic plains grasslands, the spectacular dunes and floodplains of the Mallee, and intricate forests. They include homes for threatened species of plants and animals like the critically endangered Plains-wanderer or the Leadbeater's Possum, one of our faunal emblems, which may become lost in our own lifetimes if we don't look after it.

Trust for Nature is the only organisation in Victoria empowered by law to place conservation covenants on private land, providing permanent protection of land with natural, cultural or scientific values. A conservation covenant is a voluntary legal agreement made between a private landholder and Trust for Nature, which restricts activities that may damage native habitat on the land. The best part is a conservation covenant lasts forever, ensuring what's left of Victoria's natural wonder will remain protected even if the property changes hands.

**A bequest gift to Trust for Nature is a gift to nature and to future generations. We will use your gift to protect and care for habitat so that Victoria's wonderful animals and plants can survive and thrive.**





## What would your bequest support?

Trust for Nature has the tools and expertise to permanently protect, conserve and regenerate private land in Victoria to create and sustain a healthy and vibrant landscape – but we need resources to do it. Our work is guided by our Statewide Conservation Plan, which provides a scientific framework to inform conservation on private land across Victoria.

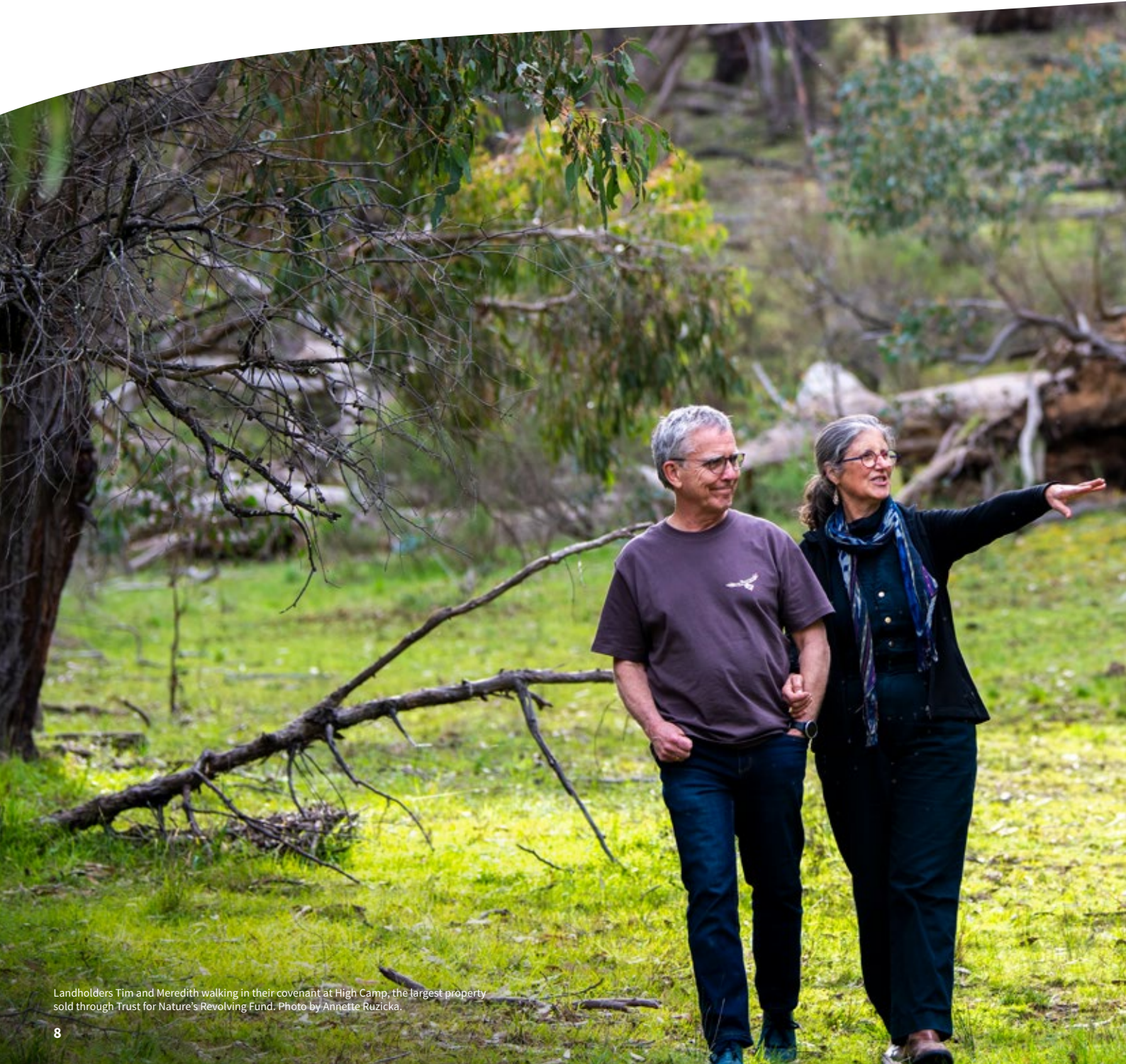
Your bequest to Trust for Nature will support our strategic priorities, helping us to:

### Be truly responsive when transformative opportunities arise

Your bequest can help build up Trust for Nature's 'fighting fund' so we can be truly responsive, acting quickly to buy land of high conservation value to protect it with a conservation covenant, leading to permanent, transformative impact.

### Increase total area of private land protected by law in Victoria

You can help Trust for Nature respond to high level of interest from Victorian landholders to covenant properties, increasing covenant areas and enabling more Victorians to work together to protect the last of what's left of our precious nature.



Landholders Tim and Meredith walking in their covenant at High Camp, the largest property sold through Trust for Nature's Revolving Fund. Photo by Annette Ruzicka.

### Accelerate scale and depth of impact for priority ecosystems

Your bequest can help us fast track resources to protect priority ecosystems that are most at-risk of habitat loss, resulting in additional under-represented ecosystems and climate change refuges protected forever.

### Level-up stewardship programs to future-proof impact

As we scale and impact, you can help us level up our stewardship program to support landholders in managing their land for conservation.

### Prioritise partnerships and opportunities for Traditional Owners and traditional land management practices

In line with our commitment to assisting Traditional Owners to conserve, restore and protect natural environments, wildlife and cultural heritage values, you can help Trust for Nature build capacity, co-design and elevate access to land conservation for Traditional Owners.



## What happens when you make a bequest to Trust for Nature?

If you are considering making a bequest to Trust for Nature in your Will – thank you, making such a gift is an incredible, life-giving contribution to protecting nature.

We ask, if you are willing, for us to record your intention within your donor records. This will aid us in our forward considerations and planning.

You can simply confirm this intention via an email confirmation. Sometimes donors provide copies or extracts of their Wills or a written summary of their intentions.

However, we understand the sensitivity of such things so respectfully leave that to your comfort. In any case, we will be respectful and honor your response.

You will also be invited to become a member of ‘Habitat Forever – Land and Legacy’. As a member, you will be informed of current and future activities of Trust for Nature, provided networking opportunities with like-minded supporters, and invited to key events that demonstrate the power of protecting habitat on private land.

Let us share and discuss your passion for conservation now, so you can learn about how your gift will be used to benefit nature and future generations.



## Making a bequest in your Will

Making a Will can be a surprisingly joyful experience, as it grants peace of mind and ensures that your wishes for your Estate are captured. A Will is the most important and far-reaching document that anyone will draw up and sign during their lifetime.

Most people will have assets of some kind to leave behind, such as property, investments and superannuation. Every individual's wishes regarding what will happen to those assets beyond their lifetime requires a Will.

If you already have a Will, congratulations on your foresight. Reviewing and updating your Will when necessary is important if circumstances change which impact on your bequest wishes and decisions.

Primarily, your Will assists in safeguarding the future of your loved ones when you are no longer with them. By recording your wishes regarding your assets, your Will also protects other aspects of life important to you, and can include your preferences of a more personal kind.

We recommend that you engage a solicitor to assist you with the preparation of your Will. This way, you'll know that your Will is valid and that your intended gifts will take effect. Your Will should then be safely stored for easy access when the time comes for your wishes to be carried out.

Very often, a philanthropic bequest will also be included in a Will, as a memorial to your values in life. If you have a love for Victoria's nature, its wonderful wildlife and plants, and want to ensure their health for future generations, Trust for Nature may be a good choice as a beneficiary.

Trust for Nature's preferred wording for bequests and devises are:

**'I give [insert gift, e.g. \$ amount / % of the residue of my estate / description of property] to Trust for Nature (Victoria) of level 5, 379 Collins Street, Melbourne, Victoria ABN 60 292 993 543 for its general purposes.'**

Notes:

1. Where a donor's Will gifts a particular property to Trust for Nature, that property should be described using both the property address and the identifying numbers from the Certificate of Title for the property (i.e. the Volume and Folio numbers).
2. Where a donor's Will gives a fixed dollar amount to Trust for Nature, we suggest that the Will should include a clause that adjusts the sum for inflation. An example clause is included here:

The gift to Trust for Nature is to be adjusted for inflation from the date of this Will to the date of my death, according to the movement of the Consumer Price Index for Melbourne between those two dates.

**Please Note:** This document is intended as a guide only. For this reason the information contained in this publication should not be relied upon as legal advice or regarded as a substitute for legal advice in individual cases. To the maximum extent permitted by the law, Trust for Nature is not liable to you for any loss or damage suffered as a result of reliance on this document. Trust for Nature, 5/379 Collins Street, Melbourne, Victoria 3000 ABN: 60 292 993 543

## A few extra notes

The Law Institute of Victoria publishes a list of solicitors who are accredited specialists in Wills and Estates. Trustee companies are also usually able to advise in relation to Wills. Trust for Nature is working in partnership with a specialist solicitor in Wills and Estates and can make a referral at your request.

In preparation for making your Will, it's a good idea to make a complete list of what might fall into both your assets and liabilities. The professional with whom you consult might also be able to ask the right questions to help you complete these lists.

It's also helpful to have on hand the correct full names, and contact details of all your chosen beneficiaries.

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