

Epworth
Medical
Foundation



Epworth
HealthCare

Our future
is in your
hands

Excellence in world class healthcare.

Message from the Chairman

The values I hold are principles I have held all my adult life. After caring for my immediate family, I hold a commitment to my community. Nothing gives me greater pleasure than to give my time, energy and support to an organisation that I know is reaching out and doing admirable work.

I am committed to Epworth HealthCare. It saves lives day-after-day. Although I cannot save lives directly, I can help provide the tools to staff so that they can perform excellence in world-class healthcare.

Those of us who hold similar values need to ensure that they are maintained long after we are gone. After taking care of family, a legacy to Epworth Medical Foundation ensures an everlasting commitment to the work of Epworth HealthCare.

In this booklet you will find some information about the healthcare group and how you can invest in its future. Of course, Foundation staff members are available to provide any further information you need.

David Rosback AM

Chairman
Benefactor's Club



About Epworth HealthCare

Starting as a community hospital in Richmond in 1920 with 25 beds and five staff, Epworth HealthCare has grown to be one of Australia's leading specialist hospitals renowned both locally and overseas.

In addition to the original facility in Richmond, Epworth HealthCare has expanded to include Epworth Eastern at Box Hill, Epworth Rehabilitation at Brighton and Camberwell and Epworth Freemasons in East Melbourne.

Epworth HealthCare has an impressive list of 'firsts' to its name. It is the first private hospital in Australia to establish an intensive care facility, sleep disorders unit and time-critical Emergency Department. It is also the first independent hospital in the state to establish facilities for open heart surgery, stroke and renal dialysis. Two years after the Epworth-Monash Fertility Clinic was established in 1982, it achieved the world first pregnancy with a donor ovum and the first birth from a frozen embryo. In 2004, Epworth HealthCare was the first hospital in Australia to acquire the da Vinci robot for assisted surgery.

Why Epworth HealthCare needs your help

Epworth HealthCare is the largest independent not-for-profit health care group in Victoria. Delivering excellence in world-class care, it is regarded as a leader in cardiology, oncology, maternity, urology, gastroenterology, spinal cord injury, orthopaedics and rehabilitation.

Epworth HealthCare receives no direct government funding. It therefore relies on the generosity of its community to enable it to stay at the forefront of advancements in technology. Thanks to its supporters, Epworth HealthCare continues to deliver the very best in life-saving care.

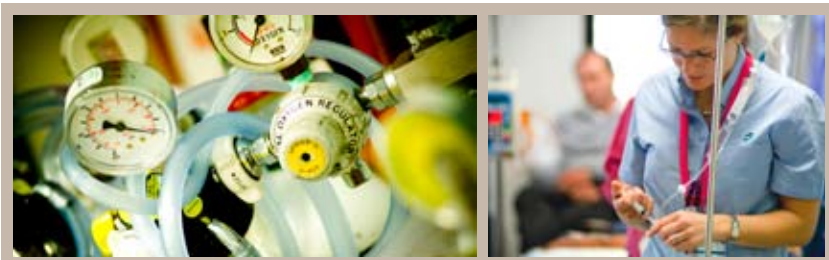
About Epworth Medical Foundation

Established in 1982 as a charitable fund, Epworth Medical Foundation provides the channel for philanthropic support to be directed to clinical care, education and research across the healthcare service.

Benefactor's Club

Those who choose to leave a bequest to Epworth Medical Foundation are invited to join the Benefactor's Club. Several social functions are arranged throughout the year to keep members informed of the developments and milestones Epworth HealthCare has achieved.

Members are also invited to be listed on the Benefactor's Honour Roll located outside the Foundation office. Naturally the Foundation understands and respects the privacy of those who wish to remain anonymous. By becoming a member of the Benefactor's Club, Epworth can appreciate and acknowledge those who hold it in high esteem.



Why do I need a Will?

No matter how large or small your estate, it is important to write a Will so that it is distributed exactly as you want. If your life ends before you have made a Will then you are said to have died *intestate*. This means that others will decide how to distribute your property.

If you already have a Will, it is wise to make sure that it is reviewed regularly to ensure that you are providing for those that are important to you; this includes both individuals and organisations.

Keeping your Will up-to-date

Your Will is a living document. The birth of a child, a death in the family, changes in employment, marital status and dependents all have an impact on your life and the demands made upon you. As your circumstances change, your Will may also need to change.

When you have less people dependent on you, you may consider leaving a gift to a charitable organisation. By leaving a charitable bequest, the esteem in which you hold that organisation will continue forever.

If you are writing your Will and would like to make a provision for Epworth Medical Foundation, you will find suggested wording in the back of this booklet. If you have already left a bequest to the Foundation, you may like to check the wording is not ambiguous.

On the other hand, if you already have a Will you can easily make an additional provision if you wish. By simply adding a Codicil to your existing Will, you can add a beneficiary without affecting the original testament.

It is recommended to seek professional advice when writing or changing your Will. Your solicitor or Public Trustee can help.

How to help

There are many ways to provide for the Epworth Medical Foundation in your Will. Some suggestions are listed below:

Bequest

You can provide a sum of money, an asset or a percentage of your estate to the Epworth Medical Foundation dedicated to a specific project or where the need is greatest.

Remainder

After taking care of family and friends, you can direct the remainder of your estate (or a percentage of the remainder) to the Epworth Medical Foundation. The remainder of your estate is known as the *residual*.

Alternatives

It is wise to suggest an alternative in your Will in the event that circumstances change. After deciding on your beneficiaries you can provide an alternative such as the Epworth Medical Foundation if one or more of your beneficiaries is unable to accept your bequest. A good example is when a beneficiary predeceases you; the provision then passes to the alternative.



Leaving a legacy

Your gift to the Epworth Medical Foundation will ensure your commitment to Epworth HealthCare is continued.

The general wording to leave a bequest to Epworth Medical Foundation is:

I give, devise and bequeath [cash, assets, proportion, remainder] to the Epworth Medical Foundation and I direct that this gift be applied in such manner as the Foundation deems fit and that acknowledgment by the Executive Director or the Group Chief Executive for the time being shall be full and sufficient discharge to my trustee(s).

The bequest can be specified as follows:

Cash

State the exact amount to be gifted to Epworth Medical Foundation.

Assets

These include property, shares, debentures, life assurance and bank deposits. To bequeath an asset to Epworth Medical Foundation include details such as the property address, company shareholdings, stocks, policy or bank account.

Proportion

Leaving a proportion of an estate means that as the value of the asset grows, the gift grows too. To bequeath a proportion to Epworth Medical Foundation, state the percentage or number of parts of the total to be distributed.

Remainder

To bequeath the residual to Epworth Medical Foundation, specify *the rest of my estate*.

Alternative

To bequeath an alternative bequest state:

Should any beneficiary predecease me, or be unable or unwilling to accept the specified bequest, I give that portion of my estate to the Epworth Medical Foundation.

I would like to join the Benefactor's Club

(Please tick)

- I have already made a bequest to Epworth Medical Foundation please enrol me in the Benefactor's Club
- I plan to make a provision for Epworth Medical Foundation in my Will please send me your free bequest booklet
- I would like some confidential advice on making a Will please ask your Bequest Planning Manager to contact me
- I request the assistance of a solicitor in preparing my Will or Codicil to my Will

Name

Address

Telephone

All communications made in the strictest confidence

Please return to:

Epworth Medical Foundation

89 Bridge Road

Richmond VIC 3121

I shall pass through this world but once.
If therefore, there be any good thing that I can
do or any kindness I can show to any fellow man
let me do it now; let me not defer it nor neglect
it, for I shall not pass this way again.

Stephen Grellett

1733 – 1855

At your service

Foundation staff members are available to help you. If you would like further information please complete the enclosed form and return to Epworth Medical Foundation.

A not-for-profit health care group

Excellence. Everywhere. Everyday.



Epworth Medical Foundation

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In support of Epworth HealthCare incorporating
Epworth Eastern, Epworth Freemasons,
Epworth Rehabilitation and Epworth Richmond.

Your support saves lives.