YOUR GUIDE

to remembering Epworth in your Will
Dear friend,

Thank you for considering leaving a bequest to Epworth Medical Foundation in your Will. Bequests have been fundamental to providing the highest quality of patient care since Epworth HealthCare opened in 1920. Looking forward, charitable bequests will be central to achieving our vision of becoming one of the world’s great academic teaching hospitals.

Today, thanks in a large part to the generosity of individuals in our community, Epworth HealthCare is the biggest private, not-for-profit healthcare organisation in Victoria, providing world class medical services and outcomes to more than 200,000 patients a year.

In 2011, we welcomed more than 3,700 new babies into the world at Epworth Freemasons. We performed more than 72,000 operations, and treated more than 28,000 patients in emergency. Thanks to our generous donors, our hospitals were the first in Australia to commission da Vinci robotic devices to support minimally-invasive surgical procedures. At Epworth Richmond, we purchased state-of-the-art equipment that enabled us to participate in trials of new and innovative procedures, such as core heart-valve replacements.

And we continue to grow and improve. We recognise that research and teaching are integral to achieving excellence in patient care, and our vision is to become the biggest academic and teaching hospital in Australia. We continually strive to provide a world-class hospital environment that not only provides the best possible outcomes for our patients but is also dedicated to their emotional and physical experiences during their time with us.

Indeed, Epworth exists for and because of its patients. We receive very limited funding from the government and, instead, rely on donations and bequests to continue to provide our patients with state-of-the-art facilities, equipment, surgical expertise and access to research.

All bequests are used to improve the quality of care and health outcomes of our patients. In many cases, bequests left to Epworth Medical Foundation have helped to literally save lives.

This booklet is a simple guide to leaving a bequest to Epworth Medical Foundation. Should you have any questions, we would be happy to help you. Please call a member of our team on 03 9426 6132 or email your query to eminfo@epworth.org.au. As always, we encourage you to discuss your plans with your legal or financial adviser.

Warm regards,

Scott Bulger
Executive Director
“I was diagnosed with breast cancer nine weeks before my wedding day, and had a double mastectomy at Epworth when I was 35.

“I felt really comfortable at Epworth. The staff were fantastic, so friendly and professional. One of the great things about being a cancer patient at Epworth was that it was a one-stop-shop for all the treatment and care I needed. From pathology to surgery to radiation and chemotherapy, everything was accessible in one place. This made life a lot easier for me in a really stressful time.

“Cancer has completely changed who I am and I have become a better person because of it. It encouraged me to see the bigger picture and now I want to give back. I know that donating to Epworth will help provide continued best practice in patient care.”

Alexandra Stewart

Donating to Epworth will help provide continued best practice in patient care.
Shaping Our History

The Lockwood Society represents a long tradition of thoughtful generosity from individuals in our community, to ensure patients at Epworth have access to the best possible care.

Epworth HealthCare first opened its doors to patients in Victoria in 1920. This was made possible by Sir Aaron Danks, a plumbing and engineering manufacturer who donated the deeds of his two-storey brick house in Marjorie Street, Hawthorn. Further funds were raised from members of the community to formally open Epworth Richmond as a 25-bed hospital.

In the more-than 90 years since then, philanthropy has shaped the history of Epworth. At every point in our growth, planned gifts and bequests have supported our development.

Bequests and donations have made it possible for us to expand and improve our hospital facilities; purchase state-of-the-art equipment that saves lives; improve patient support services; and establish and fund a dynamic research program, seeking tomorrow’s answers to today’s diseases.

Leaving a bequest gives you the opportunity to be part of that legacy. More, you will be able to shape the future of Epworth HealthCare by contributing to the quality of care our patients receive, the access they have to new and innovative methods and technologies and, ultimately, the health outcomes they enjoy.
“In 1999 I suffered two strokes and was taken to Epworth. The limbs on my right side were no longer working, my eyesight was out of focus and my speech was very slurred. Throughout this time the attention from the nurses was fantastic. I felt like I was the only person there.

“When things settled down, my wife Sallie and I looked at our financial situation. We knew we would be quite comfortable but we realised we should make a Will.

“We chose to leave a bequest to Epworth through the Foundation not only because of our connection with the hospital, but also because we believe it will have a positive impact on patients with a broad range of needs.

“Directing money straight to the hospital means the most vulnerable people will get the care they need to improve their health. It is gratifying for Sallie and I to know that it will be directed to where the hospital’s needs are greatest.”
Where the Money Goes

Bequests made to Epworth Medical Foundation are used in a range of ways to support our patients and ensure they receive the best possible outcomes from Epworth HealthCare. Most frequently, funds have been directed toward:

- New or refurbished buildings
- World class equipment purchases
- Innovative medical research
- Patient support services

Keeping mothers and babies safe

The maternity ward at Epworth Freemasons is now equipped with state-of-the-art foetal heart monitors, thanks to a bequest made by a former patient from Mt Eliza.

“The heart monitors are wireless and waterproof, allowing mothers in labour to move about freely, while information about mum and baby is closely monitored by doctors and midwives from wherever they are in the ward,” says Robyn Ackland, Maternity Services Manager.

With more than 3700 babies delivered at Epworth Freemasons each year, this advanced monitoring equipment will help ensure the best outcomes for both babies and their mothers during childbirth.
How to Leave a Bequest

It’s easy to remember Epworth HealthCare in your Will. You can either include the bequest when you write your Will, or simply add one as a clause (a codicil) to your existing Will.

Bequests can be made in a variety of ways, to suit your personal situation and preferences. For example, you may choose to bequeath:

- A residual gift, which is a share or whole of your estate after providing for your family and friends
- A percentage of the overall value of your estate, which allows for the growth or depletion of value of your estate
- A specified sum of cash
- A gift of real estate, stocks, bonds, shares or other assets
- Your entire estate
Correct Wording For Your Will

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

“I give to the Epworth Medical Foundation, ABN 77 906 718 129

a) All of my residuary estate, OR

b) …………………… percentage of my residuary estate, OR

c) The sum of $ …………………… , OR

d) [list asset or assets]

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.”

I appreciate the opportunity to be closer to people when they’re going through the fear and uncertainty of cancer treatment. Cancer experiences are always different and some illnesses are highly unpredictable. My role is to put all the cards on the table and explain the benefits and side effects of whatever treatment options they decide to take.

Dr Ross Jennens
Oncologist
The Lockwood Society

By leaving a bequest to Epworth Medical Foundation, you are automatically entitled to become a member of the Lockwood Society, a very special group of people who have also chosen to support us in this significant way.

The Lockwood Society was established as our way to say thank you for your foresight and generosity in remembering the many generations of Epworth’s future patients in your Will.

As a member of the Lockwood Society, you will receive a number of special benefits. These include:

- VIP treatment upon admission: should you ever need personal care from Epworth, you will be recognised as a VIP patient. We cannot guarantee you a private room but will do our very best to ensure that your stay with us is as comfortable as possible
- Honour board recognition
- An invitation for you and a partner or friend to attend our yearly President’s Luncheon
- Personal updates from us to keep you abreast of Epworth activities and events
- A Lockwood Society lapel pin to keep as a memento of your important contribution
“I have been a supporter of and donor to the Epworth Hospital for many years. I first experienced the wonderful care of Epworth in 1990, and have made it my hospital of choice. It is the only hospital that I want to be admitted to in the event of an injury or illness.

“Given the huge redevelopment being undertaken at Epworth, I provided for a bequest in my Will to assist in this capital campaign. Then it was suggested that I create a “living Will” by donating to Stage 1 of the redevelopment, which would allow me to experience the thrill of having a new oncology ward named after me, and watch it being built.

“I am forever thankful to Epworth for providing me with this opportunity and I look forward to opening my ward in the near future.”

Corrie Heath
Epworth Medical Foundation

Epworth Medical Foundation (EMF) was established in 1982 in order to generate much-needed philanthropic support for the activities and equipment needs of Epworth HealthCare. Our goal is and has always been to ensure that patients at Epworth HealthCare receive the best possible care and outcomes.

Therefore, funds we raise are used to contribute to and improve the excellence in medical care provided by Epworth HealthCare. For example, past donations and appeals have enabled the Foundation to purchase state-of-the-art medical equipment, fund nursing scholarships, develop research programs, and construct and renovate buildings.

We raise this money through a range of initiatives by which members of the community can support Epworth HealthCare. An important way by which we raise funds is through bequest and memorial giving. In addition, we host special and gala events, maintain regular direct mail appeals, and benefit from auxiliaries and funding through trusts and foundations.

Epworth is an outstanding healthcare organisation but, if we are to achieve our vision of becoming one of the world’s truly great academic and teaching hospitals, we rely upon philanthropic support.