



APPLICATION

Yes, I would like to leave a gift

Name: _____

Address: _____

Phone: _____

Email: _____

Name of gift fund: _____

Areas of interest:
(Please indicate any areas of community needs you wish to support)

To help encourage others, I am happy to acknowledge this in the Ballarat Foundation Annual Report (Please circle)

YES / NO

To discuss any aspect of our work and for further information please visit www.ballaratfoundation.org.au, email info@ballaratfoundation.org.au or fill in the form and mail to Ballarat Foundation, PO Box 50 Ballarat 3353.

Ballarat Foundation United Way Inc and Ballarat Foundation Charitable Fund Limited are not-for-profit organisations registered with the Australian Charities and Not For Profits Commission. The Ballarat Foundation is a member of Community Foundations Australia and we proudly service Ballarat and communities within a 50km radius.

P (03) 5331 5555
E info@ballaratfoundation.org.au
7 Lydiard Street South, Ballarat
PO Box 50 Ballarat 3353



ballaratfoundation.org.au



Ballarat Foundation United Way Inc
ABN 19 069 908 915
Ballarat Foundation Charitable Fund Limited
ABN 84 095 947 596



COMMUNITY FOUNDATIONS AUSTRALIA



GIFTS IN WILLS – A LASTING LEGACY





Leaving a gift in your will to the Ballarat Foundation is a meaningful way to ensure that your legacy lives on in the community that we all love.

By consolidating, investing and growing donations and gifts in wills, the Ballarat Foundation is a trusted community leader building a long-term, reliable funding stream for the future wellbeing of the Ballarat region.

Your gift will have lasting benefits – creating a legacy which delivers positive impact for decades.

Ballarat Foundation community grants are funded through from donations and gifts in wills which are pooled and invested with the income generated used to support positive community outcomes. JB Were Philanthropic Services manages the Ballarat Foundation investment portfolio.

Grants support key impact areas such as childhood literacy, mental health, food insecurity, homelessness, youth, community wellbeing and family support. In 2022, the foundation distributed more than \$370,000 in community grants and assistance to the Ballarat region.

A gift can be made during your lifetime as a one-off donation, over a period of time, or provided for in your will as a bequest - or a combination of these options. Gifts made during a donor's lifetime are tax deductible.

Bequest funds donated can be unlisted and contribute to the general Ballarat Foundation Fund or can listed as a sub fund in your family name. This is known as a Named Fund. The foundation has many examples of Named Funds, including the Peter Amor Sports Participation Fund.

Set up in Peter's honour by his family from funds generously bequeathed by on his passing, the Peter Amor Sports Participation Fund helps young children from disadvantaged backgrounds to participate in sport by assisting with some of the financial barriers that may otherwise prevent this.

Peter was a founding member of the Ballarat Community Fund in 1983 and served on the Board of the Ballarat Foundation for many years.

Peter was passionate about keeping Ballarat money within Ballarat to help Ballarat people. Although he was a very private person, this motivated him to publicly say that he was donating money to the Foundation in his will, in the hope it could encourage others to do the same.



How do I include the Ballarat Foundation in my Will?

The way in which you wish to support the foundation can be easily arranged. The following wording is provided as a guide. We recommend you take advice from your solicitor in relation to the preparation of your Will or fill out the form in this brochure.

1. A general purposes gift: I give (type of gift/amount) to Ballarat Foundation United Way Inc (ABN 19 069 908 915) to apply the funds as the Directors may decide in line with Ballarat Foundation grant priorities and to acknowledge grants from my bequest, wherever practical. The executor may accept a receipt from Ballarat Foundation United Way Inc as sufficient discharge for this gift.
2. A gift to establish a named sub-fund: I give (type of gift/amount) to Ballarat Foundation United Way Inc, (ABN 19 069 908 915) and request, without obligation, the Directors of Ballarat Foundation United Way Inc hold the gift in the (insert name of sub-fund) and to apply the funds as the Director decides/in favour of specific purposes (insert your areas of interest for grant making) and to acknowledge grants from (insert name of sub-fund), where ever practical. The executor may accept a receipt from Ballarat Foundation United Way Inc as sufficient discharge for this gift.