



The information provided in this brochure is general in nature, does not constitute legal or financial advice, and should not be relied upon as a substitute for professional advice. We strongly encourage you to seek professional legal, estate planning and/or financial advice before deciding upon your course of action.



BEQUESTS GIVING TO THE UNIVERSITY OF MELBOURNE



the Melbourne Model, which is designed to create an outstanding and distinctive Melbourne Experience for all students. In moving to this Model, the University is responding to the challenges of today's changing environment as well as aligning itself with leading international universities.

The University's objective is to attract the best and the brightest students and give them a profound educational experience that challenges them and gives them the skills to be successful professionals and leading contributors in the community.

Melbourne is also committed to ensuring broader access for students, especially those from disadvantaged backgrounds. The University wants the best students, regardless of financial circumstances, and to ensure this, it will expand its scholarship program, already the most generous in Australia. We want to attract students based on ability to achieve not advantage.

To help us achieve this goal the University relies more than ever on the generous support of our friends, alumni and benefactors to keep the University of Melbourne on the world stage as an innovator and leader.

FOR FURTHER INFORMATION PLEASE CONTACT ONE OF THE FOLLOWING PLANNED GIVING OFFICERS:

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The University's privacy policy is available at
www.unimelb.edu.au/unisec/privacypolicy.htm



THE UNIVERSITY OF MELBOURNE IS AUSTRALIA'S PREMIER TEACHING AND RESEARCH HIGHER EDUCATION INSTITUTION.

We have a proud past and a great future. The University was founded over 150 years ago with only four professors and sixteen students in a fledgling colony. Today, it is well established as a leading Australian tertiary institution with more than 40,000 students, with the aim of attracting both national and international students and scholars of outstanding quality to continue an environment of intellectual excellence. Our reputation is grounded on a tradition of high academic, teaching and research standards which are internationally recognised. The Times Higher Education Supplement ranking of universities recently placed Melbourne in the top twenty five globally.

In 2008, after an extensive internal and external consultation process, the University will launch a landmark educational reform in Australia known as

The Vice-Chancellor of the University of Melbourne, Professor Glyn Davis, is pictured here with Melbourne scholarship winners. Many scholarships at the University are supported by the generous benefaction of alumni and friends of the University.



LEAVING A BEQUEST TO THE UNIVERSITY OF MELBOURNE

A bequest is a gift provided for in an individual's will. Bequests may involve:

- The residuary of an estate (i.e. what remains after all other gifts and costs have been deducted);
- A percentage of an estate;
- A gift of a specific sum of money;
- A particular asset such as property, works of art, shares or an insurance policy.

Over the past 150 years, bequests have provided funding for teaching and research, library resources and to establish student scholarships, bursaries and prizes.

Many of our friends and alumni have chosen to make planned gifts to support education or research; a commitment made in the present, but realised in the future.

They are keen to ensure that our graduates and researchers continue to compete with those from the world's top universities and they want to leave a legacy for this purpose.

USE OF THE BEQUEST

When a benefactor decides to leave a bequest for the University of Melbourne, they may express in their will their wishes for the gift's future use. It is often beneficial for a benefactor to have a personal discussion with the University about a bequest intention to ensure that, in due course, the University will be able to apply the bequest according to the benefactor's wishes. Prospective benefactors can be assured that all discussions with University staff regarding a bequest intention will be treated in the strictest confidence, and incur no obligation to follow any particular course of action.

General, or unrestricted, bequests are those which allow the University to apply the funds to areas of greatest need at the time the gift is received. Unrestricted bequests are especially valuable, as they provide flexibility to respond to changing needs and priorities. These gifts have been used in the past to support priorities such as scholarships, research and library support.

Alternatively, a benefactor may prefer to specify the purpose of a bequest by nominating a particular type of initiative or a specific faculty or department which will benefit from the bequest. These bequests go a long way to help strengthen targeted areas of the University.

With substantial bequests, the donor or a nominated person may be commemorated in perpetuity through a named chair (professorship), scholarship or other initiative that will significantly enhance the University.



The Georgina Sweet bursary in social studies – 1946

Awarded to a student of social work in special need of financial assistance, this award commemorates a remarkable woman who achieved a number of firsts at a time when women faced huge barriers to success in the professions. Dr Georgina Sweet (BSc 1896, DSc 1904) became Australia's first female Professor of Biology, the University's first female Doctor of Science, and University Council appointee. She left a generous bequest to endow fellowships in geology, zoology and medicine.

SUGGESTED WORDING FOR BEQUESTS

The following simple form of bequest may be adapted by a donor's legal adviser for inclusion in a will:

"I GIVE to the University of Melbourne the whole/ proportion of my (residuary) estate and I DIRECT that the receipt of the University of Melbourne be accepted as sufficient discharge for the same."

OR

"I GIVE to the University of Melbourne the sum of (amount in words) (\$amount in figures) and I DIRECT that the receipt of the University of Melbourne be accepted as sufficient discharge for the same."

Directions expressed in general terms such as those above provide an unrestricted bequest, allowing the University flexibility in the application of the future gift. When a specific purpose is designated in the will, the University recommends including a provision which authorises the University Council to apply the bequest to another purpose, if it becomes impractical or impossible to use the bequest for the purpose prescribed in the will.

In that case, the following wording would be appropriate:

"If at any time, and for whatever reason, it becomes impracticable or impossible for the University to continue to apply the fund for the purpose or purposes directed by me in this my will, then the University Council may apply the income of the fund and, where necessary, the capital, for such other purpose or purposes as the Council determines are most closely in accordance with my directions."



Dr Gertrude Spencer bequest – 2005

Dr Gertrude Spencer (MA 1992), a psychiatrist, who had an extensive interest in classical and near eastern studies, left a bequest to the University. This includes a considerable collection of books on archaeology which will be housed in the Centre for Classics and Archaeology. Her passion for classics and middle eastern studies has been commemorated through the establishment of financial support for students studying classics and archaeology.



RECOGNITION

The University welcomes the opportunity to honour and thank benefactors during their lifetime for their intention to support the University in this very special way. In 2006, the Heritage Society was established to acknowledge the generosity of those who have left a bequest to the University of Melbourne. Heritage Society Members are kept informed of University events and offered opportunities to interact with university leaders, academics, students and other Society members at special events.

The University encourages those who have included the University of Melbourne in their will to inform the Advancement Office so their support can be acknowledged and recognised during their lifetime through their membership of the Heritage Society.

Those benefactors who have made a bequest and do not wish to become a member of the Heritage Society are also encouraged to inform the Advancement Office.



Dr David Bickart bequest – 2005

Dr David Bickart graduated in 1915 from the medical school. In his will he bequeathed a significant proportion of his estate which, in 2005, has translated into a total of \$6.3 million for the School of Medicine. This will have a transformative impact on the Faculty, and indeed the wider Australian community.



LEAVING A BEQUEST TO THE UNIVERSITY OF MELBOURNE

A: REQUEST FOR FURTHER INFORMATION (IN CONFIDENCE)

- ☐ I am interested in making provision for the University of Melbourne in my will.

Please contact me for a confidential discussion.

Title Full Name/s

Address

..... Postcode

Telephone: H() B()

Mobile

Email

Preferred time and type of contact:

.....

B: NOTIFICATION OF BEQUEST

- ☐ I have made a provision in my will for the University of Melbourne and I would like to become a member of the Heritage Society.
- ☐ I have made provision in my will for the University of Melbourne and I would prefer to remain anonymous and not become a member of the Heritage Society.

If you have decided to support the University by way of a bequest, we would be grateful if you advised the Advancement Office. Such information will be treated in the strictest confidence and does not imply a legal commitment of any kind.

C: ADDITIONAL INFORMATION (OPTIONAL)

My bequest is intended to support (please indicate below)

- | | |
|---|---|
| <input type="checkbox"/> UNRESTRICTED USE | <input type="checkbox"/> STUDENT |
| <input type="checkbox"/> SCHOLARSHIPS | <input type="checkbox"/> FINANCIAL AID |
| <input type="checkbox"/> RESEARCH | <input type="checkbox"/> LIBRARY & CULTURAL |
| <input type="checkbox"/> THE FACULTY OF : | <input type="checkbox"/> COLLECTIONS |

.....

- ☐ OTHER (please specify):

.....

Please return this form in the reply paid envelope provided



THE UNIVERSITY OF MELBOURNE

Library Digitised Collections

Author/s:

University of Melbourne

Title:

University of Melbourne Calendar 2006

Date:

2006

Persistent Link:

<http://hdl.handle.net/11343/23478>

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