



# Create your legacy of kindness

**#GiveHope** for them today and for the generations to come

## Everyone should have a Will

A Will gives you the **power to choose** how your assets are used. They're not just for the wealthy – everyone should have one. They needn't be expensive or complicated, but legal advice will ensure your Will is clear and effective.

### Here's a snapshot of what can happen if you don't have a will:

Australia has federal laws that state what should happen to your estate and your assets, if you are to pass without a Will (intestate).

#### **YOUR SPOUSE:**

If you pass without a Will, your estate automatically goes to your spouse. However, if you are estranged from your spouse, inheritance is at the discretion of the court and the outcome may not be as you wish. To Ensure YOUR wishes are fulfilled, create a legal Will to protect the beneficiaries of your estate.

#### **YOUR PARTNER:**

If you pass without a Will and you are not married, but have a live-in partner, regardless of the years you have been together, they may not automatically inherit and can be forced to move out of your shared home.

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Website: <https://au.rolda.org>



#### **YOUR CHILDREN:**

If you have minor children but no Will, (therefore no provision for them when you die), a judge can decide who is the best person to become their guardian. By creating a legal Will, you can control who raises your children and when they receive their inheritance once they come of age.

#### **YOUR FAVOURITE CHARITIES:**

You may have told your friends and family that you wish your favourite charity to receive a gift when you pass. However, if you do not have a legal Will, this wish cannot be upheld and is at the discretion of your executor.

## **6 Good Reasons to have a Will**

- 1.** A Will reflects who and what is important to you – your loved ones, family, friends, causes and charities.
- 2.** It is the only way to ensure your possessions and assets go to the people and causes you care about most. If you don't make a Will, the law will dictate how your estate is distributed. This can sometimes result in important people being left out.
- 3.** Having a Will also enables you to make important decisions such as appointing guardians of your children, and choosing your executors and trustees. You could also make your wishes for your funeral known within your Will.
- 4.** Making a Will represents an important opportunity to discuss and review your legal and financial affairs with qualified professionals.
- 5.** A Will can help avoid a costly, lengthy and stressful legal process for relatives and loved ones. Settling an estate without a Will can be a complicated and drawn-out exercise.
- 6.** Your Will should mirror important milestones throughout your life, such as buying property, relationships, marriage, children and retirement.

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Let's admit it – making a Will doesn't exactly sound like fun. But despite the paperwork, it can actually be a life affirming process. You'll be laying out your legacy and choosing what you'd like to pass on to the next generation.

## Your legacy of kindness

It's hard to say what it is about pets that leave such a lasting mark on us. Perhaps it's their remarkable ability to love unconditionally, to forgive to live life fully in the moment. Or perhaps it's simply the way they prance about on walks or stealthily take over your bed at night.

Whatever it is, **your pets have left a unique imprint on your heart**, helping to shape what matters to you most today. That may mean wanting to reach out and help the many homeless pets waiting to experience the same joy you share with your pets.

Your love of all animals, forged by those deep bonds, has already helped create a better life for many homeless pets. By making a gift to ROLDA through your *will*, *trust* or another *legacy plan*, you can create an **enduring gift** to #GiveHope to all the animals in need in the future.

## The advantages to mention ROLDA in your will

You **don't** have to **be rich** or **famous** to make a difference. You just **have to make a simple decision**. Whoever you are, whatever your situation is, you can help **create a better world** for animals in need by including ROLDA Inc in your will.

These are some of the advantages to mention our charity in your will:

You can make a gift that **costs you nothing**

You can **change your beneficiaries** at any time

You can **provide** for your loved ones but also **for a cause** that you care about

Large or small, your donation will ensure that **your values live on!**

ROLDA pledges to put your gift to the best possible use to **protect the animals in need**.

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## Suggested language

"I give to **ROLDA Inc.** (ABN 38 420 396 060)

1. The rest and residue of my Estate (or)
2. \_\_\_\_\_ percent of my Estate (or)
3. \_\_\_\_\_ percent of the residue of my Estate (or)
4. The sum of \$ \_\_\_\_\_

free of all duties and testamentary expenses to ROLDA Inc. for its general purposes and I direct that the receipt of that organisation shall be sufficient discharge to my executors for this bequest."

We realize that circumstances change and your gift to us in your will may no longer be possible at some future date. Your family and friends come first, and that's why a gift in a will is suitable for so many people: You can change your mind at any time.

We want your legacy gift to do exactly what you intend it to do. Furthermore, we want you to get the maximum personal advantages as well. So, check with your legal and financial advisors to find out how this plan can benefit both the animals and your estate.

For your convenience, we have provided some suggested language below that you could use in your will or trust. **Please feel free to adapt this language with your attorney to fit your individual situation.** We have also included this language on a tear-out form in this booklet that you may give directly to your attorney.

## Confidentiality

Your support is vital to the work we do and we thank you for it. We also respect your privacy and assure you that ROLDA, Inc fully complies with the Data Protection Act 1998.

ROLDA, Inc will not under any circumstances share your legacy information with any other organisations and all correspondence will be dealt with in strictest confidence.

If you have additional questions or need any documents, please contact us:

Phone: 0473 001 274, Email: [info@rolda.org.au](mailto:info@rolda.org.au)

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## Information for executors

As an executor, you are the nominated person who is responsible to carry out the instructions and wishes of the testator. Please contact us with any questions you have about administering a gift to ROLDA, Inc

Please send the following documents relating to the gift:

A copy of the last Will, along with any codicils

On completion of the administration, a copy of the estate accounts.

When you're ready to distribute the gift from the estate, please make a cheque payable to: **ROLDA, Inc.**  
Please post the cheque to **PO Box 5919 Brendale DC QLD 4500**

ROLDA Inc. Registered Charity Number: **ABN 38 420 396 060** | ARBN 624 622 859

## How to Begin

It's a simple process to leave a donation in your Will to ROLDA, Inc:

1. Choose the family, friends and charities that you would like to remember in your Will.
2. Talk it over with your family and loved ones. Share your vision with them.
3. Choose the type of Bequest you would like to leave to ROLDA Inc:

A **residuary bequest** is a way of passing on the residue of your estate to your chosen beneficiaries, once you've provided for your loved ones.

**Whole or a part of your estate:** You can leave your entire estate or any part of your estate to ROLDA Inc. It can be difficult to choose a specific cash amount to leave when you don't know how much will be in your estate when the time comes. Making your gift a percentage of your estate, or of the residual of your estate, means no matter the value of your final estate, the proportion you intended for ROLDA Inc stays the same.

A **pecuniary bequest** is a stated sum of money.

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**A gift in specie:** If you're considering leaving real estate or shares to ROLDA Inc, you may wish to consider leaving the gift in specie. This means it may be transferred directly to ROLDA Inc and may save your estate paying capital gains tax on the sale of the asset. Seek appropriate legal to ensure this is suitable to your circumstance.

**Life interest:** Sometimes a supporter intends to gift a property to ROLDA Inc but also wishes to allow a family member or friend to live in that home for a period of time. Once that time has passed, the property will be sold and the proceeds paid to ROLDA Inc. This is called a life interest.

A life interest may mean ROLDA Inc doesn't receive your gift until many years into the future and, in some cases, the gift may never be received at all. Seek legal advice in drafting a life interest gift to ensure your intentions are clearly set out in your Will.

**A specific bequest:** You can leave any identifiable property as a bequest to ROLDA Inc. A specific gift may include any sum of money, cash balances in a bank account, a residential house, commercial real estate or company shares.

## Estate Planning

A will and enduring power of attorney should be the cornerstone of any estate plan. To ensure your estate is administered in the manner you have chosen and to avoid unnecessary complications, it is important to seek professional advice if you intend making a will or updating your estate planning.

There are many objectives to be accomplished through the execution of a will. These include:

- appointment of an executor;
- ensuring controlled distribution of assets, which enables and obliges a person's executor to distribute the person's assets according to their wishes;
- guardianship arrangements for minor children;
- business arrangements which ensure the continuation of a business until a buyer can be found or other arrangements made
- tax considerations for the estate; etc

## General Power of Attorney

A general power of attorney is a formal document giving someone the legal authority to make decisions on your behalf. It is a legitimate way of ensuring that someone else acts for you when you cannot. This

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legal power is not without limits and the document can specify the type of decisions the person can make or for which the person can be responsible. A power of attorney can be revoked by you at any time providing you are capable of understanding what you are doing.

## Enduring Power of Attorney

An enduring power of attorney, as opposed to a general power of attorney, can remain valid even if you become legally incapable of conducting your own affairs. When a person who has not given an enduring power of attorney to another becomes incapable of managing his or her own affairs, an application may need to be made for the appointment of a guardian or administrator of the incapacitated person.

## About Testamentary Trust

The main benefits of Testamentary Trusts are their ability to protect assets and to reduce tax paid by beneficiaries from income earned from the inheritance and created by a Will. It helps provide a greater level of control over the assets of the Will.

A Testamentary Trust does not come into effect until after the death of the person making the Will. At this time, the specified deceased estate property is transferred to a trustee, who holds the assets on trust for the benefit of the beneficiaries.

If you are responsible for administering a Testamentary Trust, you should consider seeking expert legal advice, from a lawyer that deals with and has great experience in the area of Testamentary Trusts.

## Updating an existing Will

If you'd like to include ROLDA Inc in your existing Will, you may simply like to add a **Codicil** (an amendment to your Will). Codicils are a simple and effective way to make updates without re-writing your entire Will. You'll need to ensure **is signed and witnessed by a solicitor or Public Trustee**.

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## ROLDA Legacies Society

The **ROLDA Legacies Society** recognizes those who have chosen to turn their love for animals into a generous offering through their will, insurance policy or other legacy gift that provides a future of kindness to animals.

All you need to do to join the ROLDA Legacies Society is share with us that you have made a gift to ROLDA Inc in your will, trust or other legacy plan. Membership is voluntary and without obligation. Please let us know so we can celebrate your commitment and legacy of kindness.

### FREQUENTLY ASKED QUESTIONS

- Are there benefits to being in the ROLDA Legacies Society?

The biggest benefit, of course, is that you'll be helping animals in need for generations to come. But you'll also receive newsletters and updates from us, and Legacies Society's Friends get a 10 percent discount on ROLDA online store, along with free shipping.

- I already put ROLDA in my will. Do I need to do anything else?

Yes, please **complete the Confidential Bequest Form** (at the end of this document) so that we can have a written record of your generosity. It's a non-binding agreement strictly for our records and ensures that you will become a member of the ROLDA Legacies Society.

**What is ROLDA correct and legal name? ROLDA Inc**

**What is ROLDAs address?**

**PO Box 5919, Brendale DC QLD 4500**

**What is ROLDA ABN: 38 420 396 060**

**How do I get in touch with ROLDA team in Australia? You can reach our team by calling us at 0473 001 274 or emailing [legacy@rolda.org](mailto:legacy@rolda.org)**

## Your legacy in action

The legacy you create now will help ensure that the difference you've made for so many homeless pets today can continue on for the homeless pets of tomorrow.

That's especially true if you choose to designate your gift for **general use**.

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Doing so means that hundreds of animals that rely on ROLDA for care or emergency aid (food, medicines) on any given day will **feel your generosity**. So will the hundreds of community pets saved from death in ROLDA private shelters every year, or through social programs (including sterilization, microchip), and the grateful families helped. And so many more will benefit from your gift as well.

You can choose to designate your gift for **specific use**. ROLDA relies on the public generosity to be able to continue its work, all the donations currently received go to rescue injured, neglected dogs, paying for their medical bills, food and sheltering and also helping the pets from the poor communities. Since ROLDA exists, the capital projects (building the shelters, buying rescue van and equipments, major repairs) were made with major donor gifts and legacies. When you donate for a building (capital) project, you can name it in memory of someone's or to honor a dear friend or family member.

ROLDA's **medium term projects** include:

- Building a sanctuary for disabled, senior cats
- Equip the veterinary clinic to serve the small animals in need from rural community

ROLDA's **long term projects** are very ambitious:

Buying additional land to build the **PawzUp Center** which will include:

- A **sanctuary for horses** abandoned because they can't be used as working animals, in danger to become victims of the illegal trade meat;
- A **sanctuary for rescued donkeys**;
- An **indoor adoption center for dogs and cats** from where local community can adopt or where they can volunteer
- A **rehabilitation zone** for dogs that need help to trust people again
- A **therapy center** where kids with special problems, seniors from retirement homes will interact with our animals

**Where we see ROLDA 10 years from now on?**

Considering that strays 'population is decreasing, assuming that improvised shelters will slowly disappear, in 10 years from now, Romania will need spotless animal facilities and with a source of funding like legacies, ROLDA can use the vast expertise accumulated and put at work our knowledge to serve the local community. Our valuable assets include: shelter design and management, disease control strategy, experienced team with knowledge about dogs behavior and caring for large animals.

Regardless of what gift option you choose to help animals in need, your donation can be used for whatever purpose you choose. This is your gift to the future, and we have the highest respect for your

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wishes. To ensure that we can comply with your wishes, please contact ROLDA team at [legacy@rolda.org](mailto:legacy@rolda.org) before executing legal documents containing a specific use for your gift.

Thank you for your extraordinary commitment to the animals. Thank you, too, for your kind and generous heart and spirit.

## The Legacy Wall

Every generous gift to homeless pets through ROLDA does more than fill a food bowl, provide warm bedding, bandage a leg or find a forever home. It helps to **shift our society** toward one that will **not accept the ongoing killing** and will **react against the abuses** committed toward voiceless, defend less animals. Your kindness today will help, save and give hope now and into the future.

In honor of such enduring commitments, ROLDA recognizes planned gifts received on the legacy memorial wall located near our shelter building.

ROLDA operates in one of the poorest regions of Romania, located in south east of the country. On any given day, about 700 dogs, a few cats and a donkey enjoy the comfort of ROLDA sanctuaries as their home, for many the only home they ever had. For more than 15 years, homeless pets — many with special needs — who have run out of time and options have come here for love, healing and another chance to find a forever home. The work at the ROLDA sanctuaries allowed the message of kindness toward homeless pets to take root in local communities.

Even though caring people like you have helped us to make tremendous progress, more than 18,000 dogs wander on the streets, waiting to be catch and killed in filthy public shelters simply because they don't have safe places to call home.

ROLDA efforts are concentrated to help responsibly, efficiently and humanely the strays and abused animals in Romania.

Note: ROLDA, Inc does not provide legal, tax or financial advice. The information provided in this booklet is general in nature and is presented solely as educational information to illustrate charitable giving options and arrangements. You are encouraged to consult your own professional advisors to make certain a specific gift under consideration is compatible with your financial and charitable goals.

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