

Bequest Officers' Workshop



Date

Wednesday, 30 September 2009

Time

9.00 am to 5.00 pm

Venue

Hilton Hotel
488 George Street, Sydney NSW 2000

Cost

\$525.00 (incl. GST)

Morning tea, lunch, afternoon tea
and course notes included

Presenters

Presenters **Richard d'Apice AM** and **Vera Visevic** are both experienced practitioners in charities law and estate law.

Presenter **Yvonne Chandler**, Bequest Officer of the Fred Hollows Foundation, has had more than 9 years' experience as a bequest officer.

Outcome

A general understanding of the law on estate administration, claims against the estate and the legal rights of charities and non-profit organisations which are beneficiaries under a will.

Some practical tips from an experienced bequest officer about how to generate bequests.

Who should attend?

- Bequest officers
- Fundraisers



Register your place now!

To secure your place in the workshop, complete the registration form overleaf and return it to Makinson & d'Apice, Lawyers.

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Role of bequest officers

- Encouraging bequests
- Learning of death
- Following up after death
- Assessments that need to be made
- Authority and responsibilities of bequest officers

4 things you need

Wills and intestacy

- Formal validity and informal documents

What type of beneficiary are you?

- Legacy; devise; bequest/gift; residuary
- Conditional benefits

You and the Executor

- Understanding the duties of the Executor
- Starting off on the right foot
- Duty to account

A Probate application

- Standard uncontested Probate application
- Contested applications and testamentary capacity

Next steps for beneficiaries

- Obtain a copy of the will and inventory of assets
- Gauge complexity of realising the estate
- Any benefits from the tax position of the charity?
- Present entitlement
- Order of administration

Who else could be involved?

- Other beneficiaries
- *Family Provision Act* ('eligible persons') claimants

Other parties to estate administration

- Solicitors; accountants; real estate agents

Responding to a challenge (weighing the risks)

- Where do bequest officers need to be involved?
- Assess skills of executor/estate solicitor
- Size of 'benefaction'
- Potential costs and time
- Adverse publicity

Realisation of assets and interim distributions

- Time delays
- Value of assets
- How assets can be transferred
- Achieving interim distributions
- Interest on legacies
- Duty to account

Negotiating a commission

- How does this work?
- What's reasonable?

Release and indemnity

- What is their purpose?
- When should they be signed?

Practical advice for bequest officers



Registration form

Name: _____

Company: _____

Role in organisation: _____

Address: _____

Phone: _____

Mobile: _____

Email: _____

Payment options

Please debit my credit card for \$525.00

OR

I enclose a cheque for \$525.00 made payable to Makinson & d'Apice

Card type (please circle):



Cardholder: _____

Signature: _____

Card number: _____

Expiry date: ____ / ____

Security code: _____

Billing address: _____