



INFORMATION FOR SOLICITORS

Discussion with your client

1. Please ensure the correct wording is used and include our full name: H and S Hoffman and G Korsunski Carmel School Inc and ABN: 957 45 747 731.
2. If your client would like the donation to be specific to a particular program at the School, or specific to a part of the School (for example, the Science Department, the Primary School Library etc), we will happily accommodate their wishes. If you need to discuss a specific request, please contact us at shalom@carmel.wa.edu.au. Please note that donations to the Jewish Education Foundation, the Building Fund and the Library Fund are all tax deductible.
3. If your client would like to establish a legacy in recognition or memory of a loved one, we would encourage you to contact us to discuss the opportunity of titled buildings, educational experiences and programs or scholarships.

Suggested wording for wills

'I (insert name here) bequeath to The H and S Hoffman and G Korsunski Carmel School Inc ABN 957 45 747 731 for its general purposes (or name a specific purpose, such as Jewish Education Foundation, scholarship, educational program, subject area etc):

[Choose and insert the appropriate statement from the list below]

1. the whole of my estate
2. (insert number) percentage of my estate
3. the residue of my estate
4. the amount of \$ (insert the value of your gift in cash)
5. my (insert name of asset)

free of all duties, and the receipt of the Chief Financial Officer or other authorised officer for the time being shall be a complete and sufficient discharge for the Executor(s).'

Administration of an estate

When it is time to administer an estate, Carmel School appreciates your assistance in the following ways:

1. Notify us – Please contact us on shalom@carmel.wa.edu.au and include a list of any gifts or assets that have been bequeathed to the School. Carmel School may request that certain assets be dealt with in a particular manner for tax purposes. For example, the School is exempt from payment of capital gains tax, and therefore an in specie transfer of CGT assets such as investment properties or shares (rather than a sale of those assets by the executors and a transfer of sale proceeds) may result in a significantly reduced tax liability.



2. Tell us about your client – we will always want to thank remaining family and friends, as well as honour your client's memory. Acknowledging your client in an authentic way will enable us to respect their final wishes as well as maximising the impact of the donation. In the event of a dispute regarding family provision it is the practice of Carmel School to attend mediation.

Supporting charitable bequests

Carmel School understands and very much appreciates support from professional groups. You can support us in the following ways:

- Request copies of our bequest information sheet and have this on hand for your future clients regarding the opportunity to leave a charitable donation in their will.
- Join our professional network that offers assistance via our pro bono scheme. Please contact the School for more information.

Further information

If you would like more information about Carmel School, bequests or donations in general, please contact Susanna Wills-Johnson, Head of Marketing and Communications who can explain how gifts are used to benefit the School.

Susanna's contact details are:

Susanna Wills-Johnson
 Head of Marketing and Communications
 (08) 9375 4306
susanna.willsjohnson@carmel.wa.edu.au