

Gifts in Wills

Timeless giving

UNIVERSITY of
TASMANIA 



We acknowledge the palawa/pakana of lutruwita, Tasmania, and Gadigal people of Sydney, the traditional owners of the land upon which we live and work. We pay respects to Elders past and present as the knowledge holders and sharers. We honour their strong culture and knowledges as vital to the self-determination, wellbeing and resilience of their communities. We stand for a future that profoundly respects and acknowledges Aboriginal perspectives, culture, language and history.



Help shape the future

I have always felt that my education was a great gift. It is why I am so deeply grateful to return to the University of Tasmania where it all began.

My goal is to help the next generation reach their full potential too.

Educational attainment is one of the most important ways we can create a brighter future for an individual, our island and beyond. I am deeply inspired by the University's mission to work with others to create a better Tasmania and, from here, make a profound contribution to the world.

To address the greatest issues of our age, we must continue to educate, nurture and empower generations of young people to serve and shape society.

The future will be profoundly influenced by the world-leading research we do now to solve the challenges of tomorrow, but we must make a start today. We cannot achieve this alone.

Indeed, since 1895 the generosity and unconditional giving of a great many people has been central to the University's success and future aspirations.

By leaving a gift in your Will to the University you will be joining a visionary group of alumni, supporters and community members who want to leave a profoundly positive and personal mark on this world.

Your gift, regardless of size, can contribute to scholarships, teaching and research that are truly transformational. You can ensure young Tasmanians overcome financial and geographical barriers to accessing higher education, so they too can achieve their ambitions.

Your generosity can help us continue to expand the frontiers of knowledge.

Or you can support our vision to create vibrant campuses where students, researchers and industry can collaborate and innovate, making discoveries that will shape our future.

With your goodwill and generosity we can create a more equitable, sustainable and prosperous future that stretches well beyond our shores.

Alison Watkins AM
Chancellor

▲ *Chancellor Alison Watkins AM*

How will you be remembered?

Creating a Will encourages us to consider what is really important to us. We know protecting the future of our own family and friends comes first.

After considering their needs, you may wish to make a gift in your Will that creates a personal, lasting legacy.

There are many benefits to leaving a gift in your Will:

- It won't impact on your financial security or independence now, but it will have an enduring impact on future generations
- Your gift can be designed to align with your interests, providing you and your family with a positive source of purpose and pride into the future
- You can opt to receive recognition for your gift of tomorrow, today.

By leaving a gift in your Will to the University of Tasmania you are investing in a future that is full of possibilities and potential for our island State and beyond. Your generosity will underpin advances in research, education and innovation.

You can help students realise their potential, overcoming financial or geographical barriers to accessing a higher education, support cutting-edge research or enrich the University's libraries and cultural collections for the benefit of the whole community.

Every single gift is significant and the University is committed to ensuring it has the greatest impact.



“I want to give young people the capacity to think about what they want to do and where they want to go.”

There were two things that Elvy Robertson knew to be true: an education was essential and that girls can do anything. Her beliefs left an indelible mark on her daughter Bonnie Tilley.

This led Bonnie to leave a gift in her Will that will continue her legacy of helping generations of young Tasmanian women achieve their own educational aspirations.

Bonnie said her mother's beliefs were backed by lived experience. Elvy had to leave her home on the West Coast of Tasmania to study in Hobart, before training to become a teacher. Bonnie remembers her mother encouraging her to pursue a tertiary education, a formative experience she recalls fondly.

She established the Bonnie Tilley Scholarship for Tasmanian Women to give students, particularly from rural areas, the chance to study at university.

Bonnie said it was “absolutely magic” to hear scholarship recipients say how amazing it was to have someone they don't know support them. Already Bonnie is seeing her legacy come to life, with 10 students supported by her scholarship.

▲ Bonnie Tilley

► Nursing student on a home visit, Sheffield.



Areas to support

When we work together, we can shift the boundaries of what is possible.

Address educational disadvantage

Our overarching mission is to ensure that all Tasmanians have access to an outstanding university experience. We have a responsibility to deliver education to the many capable students facing economic, geographical and social barriers.

Access scholarships open doors for students, transforming lives. We are committed to supporting students who are the first in their immediate families to pursue a higher education, Aboriginal students and those from a refugee or asylum-seeking background.

By leaving a gift in your Will to support access scholarships you will foster the development of capable and curious graduates who are ready to contribute personally and professionally in their community.

Together we can attract, retain and nurture high-achieving and high-potential students, enabling access to real-life learning opportunities and industry connections. Or you can help to address Tasmania's challenges by giving our youngest learners opportunities to flourish through our children's education programs.

Endowed academic opportunities

Your support can create endowed positions to attract leading academics to the University, thereby enhancing teaching and learning outcomes. Gifts can be made in a particular area of interest and importance to you and your family.

World-class research

Our mission is to make a difference to Tasmania, and from here the world. We are focused on having a positive impact on our communities, as well as making the most of our distinctive island home which provides unique advantages and opportunities in fields as diverse as marine science and medical research.

Our history of discovery, innovation and research excellence has only been possible through partnerships with industry, government and philanthropists.

With your support, our scientists can tackle some of the world's most pressing problems, such as climate change, food security and loss of ecological biodiversity.

Climate change

Because Tasmania effectively has a zero-carbon energy system, our scientists can lead the design of the planet's future energy systems. We are restoring iconic giant kelp forests destroyed by a warming ocean, finding new ways to feed the world by making fisheries and aquaculture more productive and sustainable, and saving endangered species from extinction by uncovering new insights into the conservation of marine mammals, birds, fish and other life forms.

Protecting our unique environment

As a gateway to Antarctica and with a natural marine laboratory on our doorstep, we have a world-class reputation in marine and climate science. Such understanding is vital if we are to protect these unique environments and restore those that have been damaged.



► *Students exploring marine life at Maria Island.*

We are an island whose dependence on the sea and land has given us a rich maritime and agricultural history.

Surveying our skies

Our view of the southern sky has for years led to a world-class academic pedigree in astronomy and astrophysics allowing us to extend our knowledge beyond our planet.

Population health

The nature of our island and its people allows the study of population health not possible anywhere else in the world.

You can help us make breakthroughs that lead to healthier, longer and better lives for all Tasmanians. By supporting our world-leading expertise and research excellence in neuroscience, genetics and cancer you can drive improvements in the prevention and treatment of health challenges on a local, national and global scale.

Aboriginal knowledges

The University of Tasmania honours the enduring culture and knowledges of Aboriginal and Torres Strait Islander people.

You can join us in our aspirations to create positive change by supporting educational experiences, shared celebrations, culture and community initiatives.

Support our area of greatest need

One of the most powerful gifts you can give is to leave an unrestricted gift in your Will, which allows us to direct your donation to the areas of most need.



"My mother wanted to help in a positive way to provide a long-lasting benefit to Tasmania."

It's fitting that Pauline Barnett, who spent her life caring for others, as a mother, nurse and carer, has left a legacy that will continue to give so much to so many.

"She was kind, caring and always considered others' needs ahead of her own," recalls her daughter Alice.

No matter where she was in the world Pauline, known as Betty, always held a special place in her heart for Tasmania, the place she was raised and so dearly missed.

It is here, on the island, that Betty's legacy will live on.

"My mother wanted to help in a positive way to provide a long-lasting benefit to Tasmania."

Betty left a generous and impactful gift in her Will to the Save the Tasmanian Devil Appeal, which supports the University of Tasmania and partners to secure the future of the species in the wild.

Thanks to Betty, two early-career researchers are bringing new insights into the disease decimating the devil population.

It is the start of a long and lasting scientific journey that is likely to yield significant benefits.

▲ *Bob and Pauline "Betty" Barnett*



The foresight of retired nurse Ruby Menzie fast-tracked medical research into some of the most common and chronic diseases affecting Australians.

Before Ruby passed away, aged 89, she left a gift in her Will to the Menzies Institute for Medical Research at the University of Tasmania.

The gift was matched by the University to create the Ruby Menzie Scholarship in Population Health Research, providing six postgraduate students with the opportunity to research health challenges from osteoarthritis to mental illness.

The impact of her gift continues to reap rewards.

Many of the scholarship students she supported have careers committed to realising her vision of improving the health of the community through research or clinical care.

Ruby knew what it meant to have someone believe in you. It was only thanks to a scholarship that she was able to achieve her own dream of becoming a nurse.

Her family said Ruby was a selfless individual and her gift was an example of her generosity and commitment to the Tasmanian community and medical research throughout her life.

Ruby knew what it meant to have someone believe in you.

▲ *World-class research at the Medical Sciences Precinct, Hobart.*

How to leave a gift to the University of Tasmania in your Will

1. Contact us

Leaving a planned gift to the University is a very personal decision. Whether you would like to establish a fund in your name, anonymously, or in the name of a loved one, our experienced staff in the Advancement Office are here to help direct your gift to the area that means the most to you. It would be our privilege to help you. All conversations are private and confidential.

Advancement Office

+61 3 6226 1920 | university.giving@utas.edu.au

2. Seek legal advice

Your state or territory Public Trustee can provide advice and can help you find a solicitor. Will-kits to prepare your own Will are available online or from a newsagency or post office, however it is recommended you talk to a legal advisor before drafting your Will to ensure all legal requirements are met.

3. Talk to your family and loved ones

Sharing your intentions with your family and friends will help them understand and realise your wishes in the future. This can reduce the burden on your loved ones to make difficult decisions about the distribution of your estate.

4. Let us know

If you have included the University in your Will or intend to, please let us know. You can choose to remain anonymous, but finding out about your intention and hopes for the future can help us work with you to realise your gifts potential. It assists with future planning and allows us, with your consent, to personally thank you in your lifetime.

There are different types of gifts in Wills:

Specific or pecuniary

You are giving the University something specific that you already own. This may include a fixed amount of money (pecuniary gift) or assets such as real estate, artwork, jewellery or shares.

Residual

Your gift to the University comes from the funds and property remaining in your estate after all debts and expenses have been paid and all specific and pecuniary gifts have been disbursed.

Percentage

The gift is a percentage of your total estate, enabling your estate to be shared amongst people and/or organisations without stipulating amounts. This takes into consideration that the value of your estate may change.

Whole estate

Your gift to the University is your total estate. This type of gift can achieve transformational impact and is often nominated by those who have no living family member or other beneficiaries.

Wording your Will

We recommend you use the following statements of intent:

a. Specific sum of money or asset

I give and bequeath to the University of Tasmania ABN 30 764 374 782, [the sum of \$.....]/[the following item of my property and effects] to be applied for general purposes. The receipt of an authorised officer of the University of Tasmania for the time being is sufficient discharge to executors and trustees.

b. Percentage of estate

I give and bequeath to the University of Tasmania ABN 30 764 374 782, [.....%] of my estate to be applied for general purposes. The receipt of an authorised officer of the University of Tasmania for the time being is sufficient discharge to executors and trustees.

c. Whole of estate

I give and bequeath to the University of Tasmania ABN 30 764 374 782, the whole of my estate to be applied for general purposes. The receipt of an authorised officer of the University of Tasmania for the time being is sufficient discharge to executors and trustees.

d. Establish/support an endowed scholarship

I give and bequeath to the University of Tasmania ABN 30 764 374 782, the sum of [\$.....] to be endowed and the income of such fund to be perpetually applied for support of/the establishment of University scholarships and bursaries. The receipt of an authorised officer of the University of Tasmania for the time being is sufficient discharge to executors and trustees.

If you would like to make a gift for another specific purpose, please contact the University's Advancement Office so we can help you.

What to do if you already have a Will

If you already have a Will you can still support the University by adding a codicil, a legal provision that explains, modifies or revokes a Will. For advice on writing or amending your Will, it is recommended you consult a solicitor, trustee or accredited Wills and estate specialist.

If you would like to confirm a gift in your Will from outside Australia, please contact us.

Thank you for considering making a gift in your Will to the University of Tasmania.

Please note, this booklet is intended to provide a broad overview of making a gift in Will to the University of Tasmania. For information regarding specific areas of interest, please contact us.

The University highly recommends that you seek the advice of a solicitor, trustee or legal professional when preparing your Will. The University is not able to provide legal or financial advice in the preparation of your Will. This document does not constitute legal advice, is not intended to be a substitute for legal advice and should not be relied upon as such.

Advancement Office

+61 3 6226 1920

university.giving@utas.edu.au



◀ Town and Gown parade,
Summer Graduation

A gift of tomorrow, recognised today

If you make the wonderful decision to leave a gift in your Will to the University, we would like to thank you, and celebrate and recognise your generosity.

Once you share your intention with us, you will be invited to join our Bequest Society, a special group of people who have the foresight to support future generations.

As an honoured member, you will have access to exclusive events throughout the year where you can connect with like-minded individuals and develop relationships with leading University of Tasmania alumni, staff and friends.

Whilst we encourage you to join the Bequest Society, we also welcome and respect your wish to give anonymously.



Abbie Walker is one of four students supported by a special donor determined to help bright young Tasmanians pursue their educational endeavours.

The late Mrs Nancy Frederiksen, a long-time resident of Burnie, endowed a scholarship in memory of her late husband, Harry, who had a passion for plants and landscape gardening.

Her generous gift supports students from the North-West and West Coast of Tasmania with plenty of academic potential, but limited resources.

The financial assistance gives talented and motivated students like Abbie the freedom to focus on the thing that matters most— their education.

Abbie, who has a keen interest in the environment and geography, is in the first year of her Bachelor of Science degree at the University of Tasmania.

“Receiving this scholarship has been a life changer for me. It aided me in purchasing necessary items like textbooks, as well as helping towards my rent and other living expenses.

“This is the first time I have lived out of home and having the security of the Harry and Nancy Frederikson Scholarship has allowed me to become independent.”

“Receiving this scholarship has been a life changer for me.”

▲ *Abbie Walker*

Honouring a loved one

You may also wish to honour a family member, friend or colleague by making a gift in their memory. Perhaps the University played a significant part in their life?

Maybe they had an unrealised dream to champion for change? Or did they have an area of interest that you would like to preserve for posterity?

It would be our pleasure to discuss how we can help you create a lasting legacy for your loved one.



▶ *Tasmanian Aboriginal cultural experience, kelp water carrier making.*



Few people know the human body like a pathologist. But even after more than four decades helping diagnose, detect and monitor disease, highly respected pathologist Dr John Bothman was shocked to discover he was sick.

“The first time I noticed something wasn’t right was when we went out to dinner with friends at the Bellerive Yacht Club. When we left I was looking for our car and couldn’t find it,” Dr Bothman said. He turned to his wife and declared that his car must have been stolen.

“She said we didn’t come in yours, we came in mine.”

Dr Bothman was shocked when a brain scan revealed changes in his brain consistent with dementia. The 72 year old will retire in early 2022 after a distinguished medical career, including working at the Launceston General Hospital, Hobart Pathology and a large private practice in NSW.

He wants his legacy to support Tasmanian medical research, and recently updated his Will to include gifts to both the Menzies Research Institute and Wicking Dementia Research and Education Centre.

That’s why Dr Bothman wants to support neuropathologists, who conduct neuroscience research, to make medical advances that will improve our understanding of dementia.

“I feel strongly about supporting something local, to contribute to jobs here in Tasmania and keep people with research expertise in Tasmania.”

▲ Dr John Bothman



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