

Information for Solicitors – helping your client make a bequest to HMRI

Leaving a bequest to HMRI is an incredible way for your client to help researchers work towards new treatments and cures. Please convey our sincere thanks, and our willingness to say it in person, should your client wish to make their intent to bequest known to us.

Bequest wording for general purposes

A Will that allows HMRI to use the bequest for general purposes, or no purpose is specified, is the most effective as it allows us to fund research in response to changing needs and priorities. The decision is usually based on areas that we consider to be the greatest priority at the time the gift is received. For this category of bequest, the following draft Will clauses are suggested as a guide:

I give [insert percentage] of the residue of my estate to Hunter Medical Research Institute ABN 27 081 436 919 (HMRI), for its general purposes. The receipt of [the chief operating officer, a director or the secretary of HMRI] for the time being is a sufficient discharge to my Executors in respect of the gift to HMRI under this clause.

I give [insert \$ amount] to Hunter Medical Research Institute ABN 27 081 436 919 (HMRI), for its general purposes. The receipt of [the chief operating officer, a director or the secretary of HMRI] for the time being is a sufficient discharge to my Executors in respect of the gift to HMRI under this clause.

Bequest wording for specific purposes

Alternatively, your client can choose to specify the area of research they wish their bequest to support. For this type of bequest, the following Will clauses are suggested as a guide:

I give [insert percentage] of the residue of my estate to Hunter Medical Research Institute ABN 27 081 436 919 (HMRI), for the purpose of [insert purpose]. The receipt of [the chief executive officer, a director or the secretary of HMRI] for the time being is a sufficient discharge to my Executors in respect of the gift to HMRI under this clause.

I give [insert \$ amount] to Hunter Medical Research Institute ABN 27 081 436 919 (HMRI), for the purpose of [insert purpose]. The receipt of [the chief operating officer, a director or the secretary of HMRI] for the time being is a sufficient discharge to my Executors in respect of the gift to HMRI under this clause.

Over time, the research priorities of HMRI will change. If your client chooses to make a bequest to HMRI for a specified purpose, then we request that the following additional provision be included in their Will to address the possibility that the stated purpose cannot be performed at some future time:

If at any time HMRI determines that it is impossible or impracticable to carry out the specified purpose, then HMRI may use or apply the gift to HMRI under this clause for such other purpose or purposes as HMRI determines most closely accords with the specified purpose.

We encourage you to contact HMRI Development Officer Karen Brown on (02) 4985 5185 for a confidential discussion about your client's particular research interests, to ensure that we have the expertise to carry out their wishes.



You might also need to know:

- HMRI is an Australian Public Company Limited by Guarantee;
- We have a charity tax concession as a Health Promotion Charity;
- We are a deductible gift recipient and can provide a copy of our endorsement if required;
- Our ABN is 27 081 436 919; and
- Our address is HMRI, Locked Bag 1, Hunter Region Mail Centre NSW 2300



Contact us

For more information, including specific information that relates to establishing a charitable trust or endowment, please contact Development Officer Karen Brown on (02) 4985 5185 or via email karen.brown@hnehealth.nsw.gov.au

