



**A  
lasting  
legacy**

A guide to leaving a gift in your will to Montefiore

## Become part of the Montefiore story and help ensure a sustainable future for generations to come

Leaving a gift in your will is a powerful way of leaving a lasting legacy. It helps ensure we can continue to provide care to any member of the community as they age, regardless of their financial circumstances. At the same time, it enables us to invest and plan for the future needs of our community's ageing population.

With your support, we can continue to provide the exceptional level of care we are renowned for. Our high-quality facilities, extensive range of activities, and extraordinary staff are an essential part of the Montefiore Experience. With staff ratios up to 100% higher than the industry average, the team deliver 24/7 nursing cover, a wide range of allied health services to maintain wellbeing and quality of life, engaging programs and activities, and accommodation of the highest standard.

Our facilities at Randwick, Hunters Hill and Woollahra operate as vibrant communities, where residents know each other and form incredibly strong friendships. It is this focus on socialisation and connection that creates a true sense of belonging. Montefiore offers the only Jewish residential care facilities in NSW. The Jewish spirit is evident in the fabric of the organisation and fills every corner of the buildings.



**David Freeman AM**  
President

It's only through the support of a strong and connected community that we can do this, bonded by our common values and shared goals.

A gift in your will can be a meaningful thank you for the care you or a loved one received. Your generosity can support life-changing projects and care initiatives that your children, grandchildren, and future generations will benefit from.

Thank you for considering supporting Montefiore with a gift in your will. All gifts, no matter the size, make a vital difference to the lives of our residents and future residents.



## The difference you make

For over 130 years, Montefiore has been providing leading clinical and allied health care, as well as vital social and emotional support to our cherished older generations. Over the years, our founding Jewish values of respect, tradition, and the notion that we must look after each other as we age, have remained steadfast.

At the heart of everything we do is ensuring our residents are empowered to live with choice, dignity, and wellbeing. All residents receive the same exceptional standard of care, regardless of their financial capacity. This is our benevolent charter.

Making a provision in your will for a bequest or endowment to Montefiore allows us to carry on this important work.

“ Thanks to the generosity of our community, my sister was able to age in comfort, surrounded by friends and looked after by the most wonderful carers. ”

Joe, family member of Montefiore resident

## Leaving a lasting legacy

When you decide to leave a gift in your will to Montefiore, you can choose to have that bequest allocated to a specific purpose, such as to fund building works, or to support a particular program. If you do not specify its use, Montefiore will use the bequest in a way that will best support its benevolent charter and where it is most needed.

Here are some of the ways your gift can help.



### CONTINUED CARE FOR ALL

The Montefiore Foundation subsidises more than 30% of people living at Montefiore Residential Care at a cost of \$5 million each year.

Government funding for subsidised residents has continued to decline year on year. Your help is crucial in ensuring all members of our community can live with choice, dignity, and wellbeing as they age regardless of their personal or financial circumstances.



### SPECIALIST DEMENTIA CARE

Dementia is the most significant health issue affecting older Australians, with three in ten people over 85 living with some form of dementia. Montefiore provides specialised care for residents living with dementia through our advanced, moderate and mild dementia specific residential care units, allowing for tailored care practices to meet the individual needs of all residents experiencing cognitive decline.



### PREPARING FOR THE FUTURE

Australia's ageing population is expected to double in the next 20 years. Based on the JCA 2016 Census, we know the age profile of the Jewish population is slightly older than the general population. The median age of Jews in Australia is 44 years, compared to the general population at 38 years.

It's vital that we invest now in upgrading existing facilities and building new aged care accommodation that the community desperately needs.



### SUPPORT FOR HOLOCAUST SURVIVORS

Many of our residents are Holocaust survivors with unique care needs. This specialised care requires additional sensitivity and an acknowledgement of lived experiences. The challenges and complexities relating to both their physical and psychological wellbeing is paramount to the care they receive at Montefiore. Every member of staff undergoes rigorous training, to ensure survivors have the individualised care they require.



### COMPREHENSIVE ALLIED HEALTH CARE

Montefiore employs 120+ allied health professionals instead of using external providers; physiotherapy, occupational therapy, hydrotherapy, psychology, optometry, social work, creative therapy, speech pathology – and many more. No other aged care facility offers more comprehensive care. This means residents receive holistic, person-directed care from a team who collaborate to make sure residents have the best possible quality of life.





## Types of gifts

There are a range of ways to leave a gift to Montefiore. Whatever you decide, your gift will make a vital difference.

### 1. A SUM OF MONEY

When you generously give a specific amount of money to Montefiore.

### 2. A SPECIFIC PROPERTY OR PUBLIC COMPANY SHARES

When you generously leave a specific asset to Montefiore, such as real estate or shares.

### 3. THE RESIDUE OR A PORTION OF THE RESIDUE OF YOUR ESTATE

This is when you generously leave the residue or a portion of the residue of your estate to Montefiore.

### 4. OTHER TRUST, COMPANY AND ENDOWMENT STRUCTURES

## How to leave a gift in your will

It's important to use the correct legal wording in your will to ensure it reflects your wishes. We recommend you engage a solicitor experienced in this area to assist you to draft your will. Please contact our Foundation should you have difficulty finding an independent solicitor or for any other assistance, particularly if you wish to secure specific naming rights in advance. Below is an example of typical wording your solicitor may wish to use.

### GIVING A SUM OF MONEY

I GIVE AND BEQUEATH free of all duties death, estate, succession or otherwise payable in consequence of my death the sum of \$ \_\_\_\_\_ to the Sir Moses Montefiore Jewish Home (ABN 55 390 901 239) to be applied for the general purposes thereof and I DECLARE that the receipt of the Treasurer or other proper officer of the Sir Moses Montefiore Jewish Home shall be a full and sufficient discharge to my Trustee for the payment of the said sum and that my Trustee shall not be bound to see to the application thereof.

### GIVING THE RESIDUE OF YOUR ESTATE

I GIVE AND BEQUEATH the rest and residue of my estate, both real and personal, to the Sir Moses Montefiore Jewish Home (ABN 55 390 901 239) to be applied for the general purposes thereof and I DECLARE that the receipt of the Treasurer or other proper officer of the Sir Moses Montefiore Jewish Home shall be a full and sufficient discharge to my Trustee for the payment of the said share and that my Trustee shall not be bound to see to the application thereof.

### GIVING SPECIFIC REAL ESTATE OR SHARES IN A PUBLIC COMPANY

I GIVE AND BEQUEATH my real estate situated at *(insert address)* / or my Public Company Shares being *(insert details)* to the Sir Moses Montefiore Jewish Home (ABN 55 390 901 239) to be applied for the general purposes thereof and I DECLARE that the receipt of the Treasurer or other proper officer of the Sir Moses Montefiore Jewish Home shall be a full and sufficient discharge to my Trustee therefore and that my Trustee shall not be bound to see to the application thereof.

## How to leave a legacy

### GIVING FROM YOUR EXISTING TRUST, COMPANY STRUCTURES OR THROUGH AN ENDOWMENT

You may have an existing trust or company structures which could be adopted for the purposes of making a gift to Montefiore on your passing outside of your will. Alternatively, you may wish to establish an endowment fund to assist Montefiore. We encourage you to seek specialist advice from your solicitor or accountant as to how this can be achieved to make a heartfelt gift to Montefiore.

THANK YOU FOR  
CONSIDERING THE  
FUTURE NEEDS OF OUR  
AGEING COMMUNITY.



**P: 02 8345 9156 • E: [FOUNDATION@MONTEFIORE.ORG.AU](mailto:FOUNDATION@MONTEFIORE.ORG.AU)**

For more information about a bequest or endowment,  
please contact the Montefiore Foundation.

Sir Moses Montefiore Jewish Home Incorporated by Act of Parliament (ABN 55 390 901 239)  
is registered as a Public Benevolent Institution and has Deductible Gift Recipient (DGR) endorsement.