



TAS
FOUNDATION

Bequests - a lasting legacy



Gifts and Bequests

Buildings, playing fields and life-changing opportunities have long been the hallmark of The Armidale School. So too is the spirit of generosity and philanthropy that has enabled the School to provide so much.

Leaving a bequest is a lasting way of contributing to the future of the School and its students.

Put simply, a bequest is a gift that a donor makes in their lifetime by providing for the School in their Will.

Your bequest is an investment that will provide a quality education for a child; there is no greater legacy than an investment in a child's education.



Dominic Pilon is the recipient of the Douglass Stuart Legacy

The TAS Vision

The vision for TAS is to be the pre-eminent regional boarding and day school in NSW and one of the best in the nation. Our aspiration is high and our passion for educating and inspiring young people never wavers.

Our goals for the school are focused into core areas:

Academic:

Fulfilling every student's academic potential in an environment of stimulation and a culture that celebrates learning.

Residential:

Where boarding is an academic advantage and residential life encompasses the best aspects of home.

Wellbeing:

The focus is on the broader aspects of pastoral care for all students and staff that includes the physical, emotional, psychological and spiritual.

Co-curricular:

A robust program encompassing sport, music, drama and the visual arts for all students. The compulsory nature of this program is one of the successful aspects of a TAS education.

Leadership, Service and Adventure:

Following the firm belief that education extends beyond the classroom and each individual must embrace the opportunities offered through activities, expeditions, community service and leadership training.

Facilities:

Our magnificent campus is testament to the support of the TAS community and it is incumbent on us all to ensure its development and to manage it responsibly with an awareness of its environmental footprint.

The success of the School is only possible through the support and commitment of the TAS community.

The TAS Foundation

From the School's earliest days, the TAS community fostered a culture of philanthropy. Indeed its very origin was an act of philanthropy by the 47 individuals who provided the capital that enabled northern NSW citizens to have a *School of their Own* which opened with just 24 students in 1894.

Over the course of its history the committed TAS community has endowed the School with significant buildings and a corpus of scholarships and bursary funds. These philanthropic acts have created the magnificent school we have today and enabled students to attend who otherwise may not have been able to.

From the early buildings such as Dangar House and the Maxwell Library, to the Memorial Hall of the 1950s through to the recent magnificent Hoskins Centre we have examples of philanthropy.

The TAS Foundation dates from 1983 when the then recently retired Headmaster, Alan Cash, concerned for the future financial security of the school, established the Foundation with an independent Board and became its first Executive Director.

We are indebted to past generations of supporters who have shown their commitment to the future of the School through donation of funds, energy and time and to the current community who understand this legacy and are equally generous.



The Michael Hoskins Centre

Wills and Bequests

A Will is an important legal document that ensures that after death your wishes are protected and are efficiently implemented. In Australia, if a person dies without a Will they are said to die “intestate” and the distribution of their assets is controlled by the Public Trustees. Intestacy may result in the assets not being distributed as intended.

A bequest is an instruction given within a Will that reserves part or all of an estate for a specific beneficiary. For example, a gift in the form of a bequest can be made to the School to use at its discretion, or for a specific purpose or interest such as scholarships, bursaries or the Building Trust.

Gifts to the School in the form of bequests enable the donor to support the TAS commitment to providing the best quality educational environment for students and staff. It is a very important and lasting gift; an investment in the future of the School.

Types of Bequests

Bequests can be made to the Foundation's general purpose fund, or to the Scholarship and Bursary program, or to capital works via the TAS Foundation Building Trust. Alternatively, you may have already discussed a specific plan with the School outlining a tailored proposal for your Bequest.

The usual type of bequests take the form of:

- The residue of the estate;
- A percentage of the estate;
- A specific amount of money;
- A life insurance or superannuation policy;
- Assets such as shares, property, works of art, jewellery etc.

The School is grateful for all gifts and for the lasting and direct impact that is achieved through a bequest.



How to Leave a Bequest

We recommend that you seek your own legal advice on the structure of your Will from your solicitor, trustee company or the Public Trustee and inform your family of your intentions.

If you are considering leaving a bequest to the School and would like to discuss your wishes and ideas, please call the staff of the Development Office on (02) 6776 5800. All discussions with the School concerning donations and bequests are treated with strictest confidence.

If you already have a Will, then it is possible simply to develop an addition to the Will in the form of a Codicil which alters its terms and makes allowances for the new gift intentions. This is a straightforward and easy way to make alterations.

If you have not yet made a Will, we would be grateful if you would consider a bequest to the School or the Foundation.

Suggested wording for your Will

The TAS Foundation website (www.as.edu.au/foundation) has examples of suggested wording you and your solicitor can consider when wanting to make a Codicil to your Will.

Below is a very simple example.

- 1 I give _____ to one of the following nominated beneficiaries
 - 1.1 The Armidale School Foundation for its general purposes
 - 1.2 The Armidale School Foundation Scholarship Fund for its general purposes.
 - 1.3 The Armidale School Foundation Building Trust for its general purposes
 - 1.4 The Armidale School for a nominated purpose
- 2 I declare that the receipt of the secretary, treasurer or other proper officer of the nominated beneficiary will be a full discharge for my trustee, who will not be bound to see its application

Organisational details

- The Armidale School Foundation is a registered company under corporate law, ABN 93 326 194 937
- The Armidale School Foundation Building Trust is a registered company under corporate law, ABN 41 013 426 202
- The Armidale School Foundation is also registered under the provisions of the Charitable Fundraising Act (NSW) 1991
- Address details: Locked Bag 3003, Armidale NSW, 2350 Australia

Acknowledgment

It would be most helpful for us to know if you have made a bequest to the TAS Foundation in your Will. We believe it is important to acknowledge and thank our benefactors in their lifetime for the contribution they will be making to the school.

If it is appropriate, and if you would like to let us know of your intentions, or you would like more information before taking any action, please contact:

Cressida Mort on cmort@as.edu.au or by calling 02 6776 5800.

The Foundation website also has answers to some questions you may have about leaving a bequest www.as.edu.au/foundation

Thank you

