



Garvan Institute
of Medical Research

Taking care of the next generation is in our DNA

Leave a gift in your Will to Garvan and
become a *Partner for the Future*

At Garvan, we see a future where all diseases can be prevented, treated or cured.

Personalised medicine is revolutionising healthcare worldwide, and the Garvan Institute is at the forefront. We ask the tough research questions to find better ways to diagnose, prevent and treat disease. But it is only with your curiosity and commitment that we can find answers to these questions.

Built on a foundation of over 60 years of extraordinary science, Garvan is home to more than 70 research groups tackling some of the most intractable scientific and clinical challenges in cancer, genomics and immunology. Our programs unite research expertise and advanced technologies across the Institute, while fostering collaborations with clinical, industry and consumer partners with the sole focus of making discoveries that

can be translated to the clinic to directly impact patients and the community.

Disease touches all of us, and Garvan's research would not be possible without the partnership and vision of the Garvan family. By joining us in our mission to make discoveries that will improve health for all, you will be making an investment in the health and well-being of future generations.

We warmly invite you to partner with us in realising our bold vision for the future.

Professor Benjamin Kile LLB PhD FAHMS
Executive Director
Garvan Institute of Medical Research

A gift in your Will is a gift for generations to come.

A gift in your Will to Garvan is a meaningful way to make a lasting impact on the health and lives of future generations. By supporting Garvan, you're leaving a legacy of helping not only your own, but everyone's family and friends – now and in the future.

By including a gift in your Will to Garvan you are joining a family of honoured supporters that we call '*Partners for the Future*'.

Many of our *Partners for the Future* tell us they have included a gift in their Will to Garvan in memory of their loved ones. They also tell us they want to make a difference to the health and lives of their family and friends – both now and for future generations.

A vital source of funding

Gifts in Wills allow Garvan a considerable degree of flexibility and security in planning for the future. Funds from gifts in Wills are applied thoughtfully to our research areas that will have the most impact.

For every \$1 we receive in Government research grants, we must find an additional 70c for our research to be achievable.

So whether large, medium or small – a gift in your Will to Garvan will strengthen the longevity and impact of our medical research.

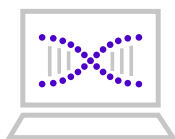


For more information about becoming a **Partner for the Future**.
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Our discoveries today will lead to better health tomorrow.

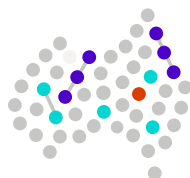
Garvan brings together world-leading scientists and clinicians to advance our understanding of disease, particularly cancer, autoimmunity and genetic disorders.

Our work is centred around our Strategic Research Programs, each articulated with a vision that aspires to major scientific and clinical impact:



Genomics

Changes in our genome, or DNA sequence, can influence our risk of nearly every disease. Our mission is to accelerate the diagnosis and treatment of inherited disease and develop innovative new therapies for some of the most prevalent conditions facing society today.



Cancer

Despite advances in early detection, surgery and treatment, 10 million people die of cancer worldwide each year. At Garvan, our mission is to enable a future where all cancers can be effectively treated, controlled or prevented.



Immunology

The immune system is the body's front line of defence against disease. Our mission is to improve the management of immune conditions and to harness the immune system to develop treatments personalised to individual patients.

Together we can strive for a healthier tomorrow.
Visit: garvan.org.au/gift-in-your-will



Tracey Lea



Partner for the Future - Greg

Greg was just 11 when he found out about his 13-year-old sister Tracey Lea's teratoma tumour. "I knew something was wrong. She was in so much pain," he recalls.

Greg's memories of Tracey Lea are vivid, even though it's been decades since he's seen her. "She wanted to be a journalist, I was mucking around, surfing a bit, but she put her heart and soul into everything. She used to write long poems. They were so beautiful."

Before she died aged 16, Tracey Lea was misdiagnosed three times and went through rounds of chemo that didn't help her condition. Greg hopes no one else will have to suffer the same unnecessary pain.

"If Tracey Lea had been diagnosed today, I know that her cancer could have been identified through the technology and expertise at Garvan."

Though he's still years from retirement, Greg has decided to plan ahead and leave a tribute to Tracey Lea by remembering Garvan in his Will.

He says: "Perhaps one day, by the time my bequest reaches Garvan, they will be able to sequence everyone's DNA or be able to identify the tumour and plan treatment for someone like Tracey Lea within an hour or two. I know that idea would have made Tracey Lea very happy."

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Together we will make discoveries that will **improve health** for all.

If you decide to include a gift in your Will to Garvan, you will be partnering with an organisation that has been a nationally and internationally recognised centre of excellence in medical research for over 60 years.

With your support we can fight not just one disease, but many and give everyone the best shot at a healthier tomorrow.

At some point, we all have to face up to failing health. Sometimes the fight is quick and easy; sometimes it's a lifelong struggle, but no matter what fight we face, whether it's in our bodies, our loved ones, in our minds or in our hearts, we always hope for a healthier future.

At the Garvan Institute of Medical Research, with your support, we believe that future is within reach for everyone.

Together we can improve health for all.
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Partners for the Future - Joe and Betty

Joe and Betty thought they'd retired in 1992, but then Joe read an article about the new Australian Alpaca Centre – he fell in love with the animals and their retirement plans were put on hold!

Alpacas were to occupy their next 25 years, first in breeding and showing, then in machine knitting garments from the fleeces they produced, which they sold at Canberra's Old Bus Depot Market.

However, their lives were ripped apart in September 2013, when Joe was diagnosed with aggressive mantle cell lymphoma. During six months of heavy chemo the couple's eyes were opened to the impact of illness and how medical research can help.

The more the couple read about research the more their interest grew - this interest led them to the Garvan Institute. Following tours at both Garvan's Darlinghurst and Moss Vale research facilities, Joe and Betty made the selfless decision of leaving a bequest to Garvan in their Will, and became Garvan *Partners for the Future*.

Right now, Joe is in his tenth year of remission and continues to convey a sense of gratitude to medical research for saving his life. "What I've got is incurable, but because of medical research it's manageable."

"We are enjoying the benefit of those who contributed to medical research before us. So, in a way we are transferring our thanks for that support towards the future."

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Partners for the Future - Terry and Helen

Terry and Helen had been aware of Garvan for a long time. When they decided to research organizations to support with a gift in their Will, the Garvan Institute was one of their top considerations. Following a visit and tour, Garvan made the list.

Terry explains: "There were some key things that impressed us. Garvan reassured us that the funds would be put towards the research area that we nominated. We're able to regularly review our decision too, because we understand that research needs change over time.

He continued: "Garvan has critical mass and attracts the very best researchers, which was evident in the quality of the research. Ultimately, we are confident that the funds would be managed properly and be used to potentially make a difference long term.

"We wanted to make sure our money was used for something significant – research that would have practical applications, helping people in the long term."

Helen added: "If you are considering leaving a gift to Garvan in your Will, I would highly recommend visiting, seeing the building, learning more about the research, the quality of the researchers and the professionalism of the staff. All these factors added to my confidence that we were making the right decision."

Together we can stop disease before it starts.
Visit: garvan.org.au/gift-in-your-will

Will you become a Garvan *Partner for the Future?*

If you choose to become a Garvan *Partner for the Future*, we'd welcome the opportunity to thank you personally, we'd also like to reassure you that we will always protect your privacy and respect how you prefer to hear from us and about our progress.

As a *Partner for the Future*, we will keep you up to date on our research in our *Breakthrough* newsletter and through invitations to special Garvan events and personal lab tours with our scientists.

As a small token of our appreciation of your generosity, we also offer the option to include your name on our Honour Board situated in the Galleria in our building in Darlinghurst, Sydney, as well as in our Annual Report.

In loving memory and tribute to loved ones, many of our *Partners for the Future* choose to include the names of family or friends on our Honour Board. For example: "In loving memory of.....", "The Family" or similar.

And of course, if you'd prefer you can remain completely anonymous.

For a confidential discussion, and to find out more about becoming a Garvan *Partner for the Future*, please contact our Future Giving Manager, Rachael Arrott, by phone 02 9295 8559 or email futuregiving@garvan.org.au.



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Getting started

When making a Will, it is important to talk to your loved ones about your intentions and let them know that leaving a gift to medical research is important to you.

This can help to ensure that your personal legacy and wishes will be met. You should seek professional advice from an estate planning legal adviser to ensure your wishes are recorded in a legally binding way.

Following that, it's easy to arrange a gift in your Will to the Garvan Institute of Medical Research and become a *Partner for the Future*. You can either include a gift when writing or updating your Will or add it as a codicil to an existing Will. Your solicitor can advise you on the best way to add a codicil to your Will.



There are a number of ways you can arrange a gift in your Will to Garvan:

- **A residual gift** which is a share of, or whole of, what's left of your estate, after providing for your loved ones.
- **A percentage of the overall value of your estate** which allows for growth or depreciation in the value of your estate.
- **A specified sum of cash.** However, this does not allow for changes of circumstance or inflation.
- **A gift** of real estate, stocks, bonds, shares, artwork, jewellery or other assets.



Together we can have a transformational impact on health.
Visit: garvan.org.au/gift-in-your-will

Wording your Will

When the time is right, please take this wording to your solicitor to assist in leaving a gift in your Will to Garvan. The specific wording below will be relevant according to your personal situation and preferences. Your legal advisor can help you decide what is right for you.

Proportional gift: I give ____ % (enter percentage) of my estate, free of all duties, to the Garvan Institute of Medical Research (ABN 62 330 391 937) to be applied for the purposes of medical research by the Institute. I declare that the receipt of a Director or other authorised officer will be a sufficient discharge to my executors who will not be bound to see to the application of this gift.

Residuary gift: I give ____ % (enter percentage) of my residuary estate, free of all duties, to the Garvan Institute of Medical Research (ABN 62 330 391 937) to be applied for the purposes of medical research by the Institute. I declare that the receipt of a Director or other authorised officer will be a sufficient discharge to my executors who will not be bound to see to the application of this gift.

Pecuniary gift: I give \$ ____ (enter dollar amount) of my estate, free of all duties, to the Garvan Institute of Medical Research (ABN 62 330 391 937) to be applied for the purposes of medical research by the Institute. I declare that the receipt of a Director or other authorised officer will be a sufficient discharge to my executors who will not be bound to see to the application of this gift.

Specific gift: I give ____ (enter specific gift), to the Garvan Institute of Medical Research (ABN 62 330 391 937) to be applied for the purposes of medical research by the Institute. I declare that the receipt of a Director or other authorised officer will be a sufficient discharge to my executors who will not be bound to see to the application of this gift.

If you need help with any aspect of leaving a gift in your Will or you would like our Future Giving Manager, Rachael Arrott, to talk to your solicitor please feel free to give her a call on 02 9295 8559 or email futuregiving@garvan.org.au.

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Partner for the Future - Diane

Diane has always considered herself a fortunate person, with a happy upbringing, rewarding career, opportunities to travel and the company of good friends and family. But there is also sadness.

Both Diane's parents passed away after significant medical ordeals. Her father from dementia and her mother from leukaemia. She also had a friend who succumbed to ovarian cancer.

"I've been very fortunate and I would like to give back. I really want to help researchers and Garvan, being a wonderful institution, to be able to move forward."

Witnessing the suffering of loved ones crystallised for Diane the value of medical research and how it offers hope. Diane's experiences combined with her gratitude for her blessings, have underpinned her decision to become a Garvan *Partner for the Future* and nominate Garvan as a beneficiary of her Will.

She says: "You can't do medical research without financial support and that's where I can help. I want to know that when my life ends, Garvan can progress and continue to make medical breakthroughs."

Together we can make the breakthroughs society needs.
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Partner for the Future - Peter

Both Peter's parents and grandparents grew up in the bush and their families lived through both World Wars and the Great Depression. Despite these difficulties, both his parents were given the chance of a better life with gifts of kindness and opportunities from people around them. As a result, the desire to create a brighter future for the next generation has always been a strong force in Peter's life.

When Peter made the important decision to leave a bequest to the Garvan Institute in his Will, becoming a *Partner for the Future*; he was carrying on a family trait of wanting to leave a better life to those that come after him.

Medical research and the importance of finding cures – or at least better treatments for a range of diseases, is close to Peter's heart after both his parents lived with prolonged illnesses.

"My parents and grandparents passed the baton of a better life to me, and I feel it's my duty to continue this and give back to others."

His mother Dorothy developed a form of chronic haemophilia for which there was no known cause or cure. After she passed away, Peter's father Carl decided he wanted to leave money to medical research, but after suffering a stroke in 1989, he never got the chance. As a *Garvan Partner for the Future*, Peter is honouring his father's wishes and his parent's memory.

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Our promise to you

Making the decision to leave a gift in your Will to support vital medical research is one that we want you to feel happy with. That's why we make the following promises to our partners:

- We will always respect your privacy. We recognise and appreciate that your Will is completely personal to you.
- We also realise that, rightly, your family and loved ones will always come first.
- We recognise that leaving a gift in your Will is completely your decision and needs to be made in your own time.
- You can tell us that you've left a gift if you want to, and we'd love to hear – but you don't need to.
- If you do choose to tell us, you can still choose how we communicate with you in the future about our research.



Together we can drive world-class medical research.
Visit: garvan.org.au/gift-in-your-will

- We will give you and your family as much choice as we can about how and where your gift will be used to make a difference to the health of future generations.
- We will use your gift carefully and cost effectively so that it has the greatest impact for our research.
- We will give you the opportunity to be connected with the work we do, that is made possible by gifts like yours.
- At any time, you have the absolute right to change your mind about a gift in your Will to Garvan.



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The importance of a **valid Will**.

Many of our *Partners for the Future* tell us they feel peace of mind knowing that their wishes for their family, friends and the special causes that are close to their hearts, will be met.

Even if you think your estate may be small, by having a valid Will, you will be ensuring your life's legacy has the lasting impact you desire.

We encourage you to seek legal advice with an estate planning specialist. They can ask questions about your personal situation and provide advice on how best to structure your Will and your assets.

For example, some assets such as superannuation and insurance may not form part of your estate. A legal professional is the best person to advise you on these matters.

"Everybody wants to leave the world a better place and by supporting Garvan we know we are helping all of humanity."
– Peter and Susanne, Garvan Partners for the Future

Together we can protect future generations.
Visit: garvan.org.au/gift-in-your-will

Useful information for **solicitors and executors**.

Garvan is a not-for-profit organisation. For every \$1 we receive in research grant funding from the Government, we must find an additional 70 cents through public fundraising.

Deductible Gift Recipient Status

The Garvan Institute of Medical Research (ABN 62 330 391 937) holds Deductible Gift Recipient (DGR) Status Item 1 and is fully Tax Exempt.

As the Fundraising and Marketing division of the Garvan Institute, the Garvan Research Foundation (ABN 91 042 722 738) also holds Deductible Gift Recipient (DGR) Status Item 2 and is fully Tax Exempt.

Capital Gains Tax on estate assets and transfer of shares 'in specie'

As the Garvan Institute of Medical Research is fully Tax Exempt, the transfer of all Capital Gains Tax assets such as real estate or shares to Garvan will result in significantly reduced tax liability, rather than pre-selling those assets by executors and transferring the sale proceeds.



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Partners for the Future - Gabriel and Joan

Australian author Gabriel and his wife Joan worked hard for many years to be where they are today. Gabriel became involved with Garvan in 2008, joining the Board of the Garvan Research Foundation.

In 2013 Joan was diagnosed with breast cancer. Considering a mammogram only a year earlier had been clear, it was a huge shock. Gabriel remembers hearing the news. "It was a phone call late at night, but we'll never forget it."

Joan had surgery to remove the tumour and then underwent chemotherapy at The Kinghorn Cancer Centre in Darlinghurst, Sydney – a joint initiative between Garvan and St Vincent's Hospital.

Joan's breast cancer treatment was successful, and she believes the combination of medical researchers

and patients in the same building provides something special and unique. "I found a place that was very comforting. I felt truly safe there."

"We asked ourselves, what could possibly be more important than supporting cutting-edge medical research which will benefit generations to come? The answer was obvious, and we decided to leave a bequest to the Garvan Institute of Medical Research in our Will."

Gabriel and Joan had decided to support the future of medical research in Australia before Joan's diagnosis, but their experience made their decision feel even more justified. Their support will help to provide personalised treatment for patients for generations to come, just as Joan received throughout her breast cancer journey.

Together we can accelerate discoveries that have the power to transform health. **Visit:** garvan.org.au/gift-in-your-will

Making sure your legacy lives on.

We feel there is no greater privilege than to be included as a beneficiary in a person's Will.

We take great pride in honouring the legacy entrusted to us. We see it as our duty to ensure our supporters' legacies are managed ethically and applied thoughtfully; for instance, to areas in most need, or where there is the best chance of making a real healthcare breakthrough.

In tribute to such a generous and thoughtful gift, we ensure our partners' names are included on our Honour Board and in our Annual Report.

We encourage friends, family and loved ones to visit Garvan so they can hear about the research progress that has been made possible with the selfless and invaluable support of our *Partners for the Future*.

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