

# Advice re. Bequests to St Andrew's Cathedral

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The following wording could be used if you wish to make a bequest to St Andrew's in your will. Of course, we encourage you to consult a solicitor for advice, as needed.

## **Suggested Wording – Bequests for the general purposes of the Cathedral**

The following wording could be included in a will for the purposes of making a testamentary gift for the general purposes of a particular Anglican Church –

*“To the Chapter of St Andrew's Cathedral Sydney to be applied for such purposes of St Andrew's Cathedral Sydney as may be determined from time to time by a majority of the Cathedral's Chapter. The receipt by any two (2) of the Chapter members shall be a sufficient discharge for my executors.”*

## **Notes regarding more specific situations**

1. A gift may be made for a more specific purpose – for example, a testator may wish that a gift be made for the purposes of building repairs, maintenance, improvement or replacement. In such a case, the gift could be expressed as follows –

*“To the Chapter of St Andrew's Cathedral Sydney to be applied for such purposes of repairing, maintaining, improving, and/or adapting the Cathedral buildings and grounds in the manner determined from time to time by a majority of the Cathedral's Chapter. The receipt by any two (2) of the Chapter members shall be a sufficient discharge for my executors.”*

2. Where the proposed gift is real estate or an amount of \$100,000 or more, consideration should be given to making the gift to the Anglican Church Property Trust Diocese of Sydney – the corporate trustee of the Anglican Church Diocese of Sydney – to be held in trust for the purposes of the Cathedral. The Anglican Church Property Trust Diocese of Sydney, as corporate trustee, has wider investment powers than the Cathedral Chapter and this may be of particularly relevance where it is intended that a gift be used to create a fund for investment. The wording of such a gift could be as follows –

*“To the Anglican Church Property Trust Diocese of Sydney to be applied for such purposes of St Andrew's Cathedral Sydney as may be determined from time to time by a majority of the Cathedral's Chapter. The receipt by the Secretary of the Anglican Church Property Trust Diocese of Sydney will be sufficient discharge for my executors.”*

Where a large special purpose gift is intended, the wording of Notes 1 and 2 may be combined, so that the specific purpose is made clear to the Anglican Church Property Trust.