

Gifts in Wills

Information for Solicitors



After discussing with your client

- Please ensure the correct wording is used and include our full name Kevin Heinze Garden Centre ABN 63 073 435 291.
- If your client would like to establish a legacy in recognition or memory of a loved one, we would be happy to accommodate their wishes. Please contact us to discuss any specific requests.

Suggested wording for Wills

The following wording is provided as a guide only. Please feel free to speak to our staff directly if you have any queries on (03) 9848 3695.

"I (*INSERT: name here*) give to Kevin Heinze Garden Centre ABN 63 073 435 291 (*INSERT: the percentage or residue of your estate, the amount of money, or the details of your property, shares, bonds or item of value*), my gift is to be used for the general purposes of Kevin Heinze Grow. I declare that the receipt of its Secretary, Treasurer or other authorised officer shall be sufficient discharge to my executors."

Administration of an estate

When it is time to administer an estate, Kevin Heinze Grow would appreciate your assistance in the following ways:

1. Notify us

Please contact us and include a list of any gifts or assets that have been bequeathed to Kevin Heinze Grow. Kevin Heinze Grow may request that certain assets be dealt with in a particular manner for tax purposes. For example, Kevin Heinze Grow is exempt from payment of capital gains tax, and therefore an in specie transfer of CGT assets such as investment properties or shares (rather than a sale of those assets by the executors and a transfer of sale proceeds) may result in a significantly reduced tax liability.

2. Tell us about your client

It is our wish to thank remaining family and friends and honour your client's memory. These actions allow us to respect your client's wishes, honour their memory and maximise the impact of their donation. In the event of a dispute regarding family provision it is the practice of Kevin Heinze Grow to attend mediation.

Contact details

For further information, to clarify details or to have a confidential conversation please contact Georgia Tracy on (03) 9848 3695 or by email at georgia@kevinheinzegrow.org.au. Additional information is also available on our website www.kevinheinzegrow.org.au/support-us/gifts-in-wills/ where you can download a copy of our Gifts in Wills brochure.

Gifts can be transferred directly to Kevin Heinze Grow:

Kevin Heinze Grow

BSB: 633 000


Account number: 146 052 337

Payment reference: Client's first name and surname. Please call or email to notify us of the gift. (03) 9848 3695 or georgia@kevinheinzegrow.org.au



For more information please contact Georgia Tracy on

 georgia@kevinheinzegrow.org.au

 (03) 9848 3695

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