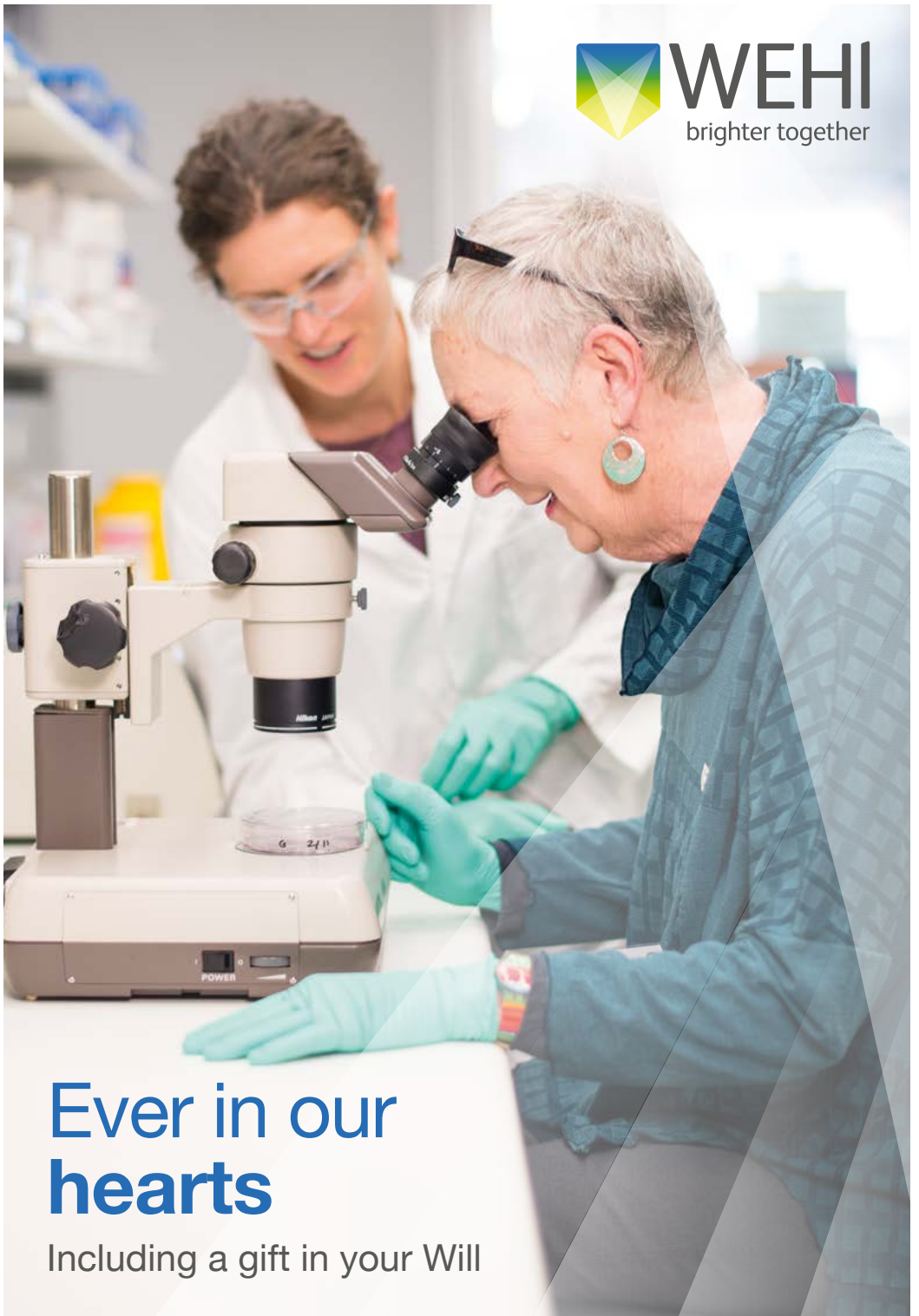




WEHI
brighter together



Ever in our hearts

Including a gift in your Will

Eliza Hall founded the Walter and Eliza Hall Trust to assist those in need. A gift from the trust established the Walter and Eliza Hall Institute in 1915.



Cover image: Dr Clare Morgan sharing a research procedure with bequestor Roz Edmond during a visit to WEHI.

One of Australia's most important philanthropic gifts

In the 1850s, Englishman Walter Hall arrived in Australia with only a few pounds in his pocket to seek his fortune in the goldrush.

After an inauspicious start he became a successful and wealthy businessman, with interests in the Mount Morgan gold mine, Cobb & Co and the booming pastoral industry.

Walter and his wife Eliza were active philanthropists during their life together. When Walter died in 1911, Eliza set up the Walter and Eliza Hall Trust to assist those in need, particularly women and children.

Eliza's gift of one million pounds to establish the trust was then the largest charitable gift in Australian history, the equivalent of more than \$111 million today.

One of the trust's most renowned accomplishments was establishing the Walter and Eliza Hall Institute of Medical Research in 1915.

The trustee's vision was an Institute that would be "the birthplace of discoveries rendering signal service to mankind in the prevention and removal of disease and the mitigation of suffering".

We are proud to continue our century-long relationship with our founding donor, the Walter and Eliza Hall Trust.

"The birthplace of discoveries rendering signal service to mankind in the prevention and removal of disease and the mitigation of suffering."

Trustees, Walter and Eliza Hall Trust

Director's message

Thank you for considering leaving a gift in your Will to WEHI.

For more than 100 years, the Walter and Eliza Hall Institute has been making discoveries for the benefit of humanity. And it all started thanks to a bequest from Eliza Hall in memory of her husband, Walter.

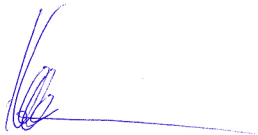
Institute patron and former director, Sir Gustav Nossal, recently decided to make public his personal decision to leave a gift in his Will to WEHI, as we are now known. By sharing his decision, Gus invites us all to consider the legacy we want to leave and the difference this can make for better health outcomes for future generations.

As director, I know that bequests have been transformative for the Institute, often arriving unexpectedly and providing WEHI with the opportunity to back bold ideas or offer vital support to young talented scientists.

Choosing to leave a gift in your Will is a big decision and I hope that the information provided here is helpful to you. When the time is right, we are happy to talk to you confidentially about how you would like to contribute to the next 100 years of discoveries.

I also hope that you will become a member of the Walter and Eliza Hall Society by letting us know about your planned gift. It is always a privilege for me to host the Walter and Eliza Hall Society events. I look forward to meeting you in person, thanking you for your support and keeping you informed of our progress. We could not continue our vital work without you.

Very best wishes,

A handwritten signature in blue ink, appearing to read 'Ken Smith', with a long horizontal line extending to the right.

Professor Ken Smith
Director

Professor Ken Smith



100 years of discoveries for humanity

WEHI is where the world's brightest minds collaborate and innovate to make discoveries that will help us to live healthier for longer.

We bring together people with different skills and experience who are committed to long-term discovery. Our medical researchers have been serving the community for more than 100 years. We know that we can achieve better things bringing together diverse teams who work together for 10, 20 or even 50 years to tackle the big issues.

We are brighter because of our collaborations with hospitals, universities, research institutes and industry, and the support of our community, including philanthropists, donors and bequestors, alumni and consumers.

Our teams of researchers are committed to solving the most complex health problems, making transformative discoveries for cancer, infectious and immune diseases, developmental disorders and healthy ageing.

Bioinformatics research has uncovered a tumour gene 'signature' that may lead to better outcomes for cancer patients. This research is supported by a gift made in memory of Betty Smyth. Her son Professor Gordon Smyth, a Bioinformatics division head, is also a bequestor.



I'm leaving a gift in my Will to WEHI.

Will you join me?

With the support of my family, I have decided to make a legacy gift to the wonderful Institute that has been my pride and joy for 60 years.

I am sharing my decision because you may also be considering your legacy. In addition to taking care of family, I think that we all want to leave the world a better place for the next generation.

In the decades that I was director of WEHI (1965-96), I experienced first-hand the impact of bequests. So often, generous gifts in Wills arrived just in time to fund a bold new idea, purchase a vital piece of equipment or support a brilliant young scientist.

It is often gifts in Wills that enable WEHI to continue to support the journey of discovery, and ensure brilliant discoveries made at the bench are translated to the bedside.

I hope you will join me in making a legacy gift to WEHI, for the benefit of generations to come.

Warmest regards,

A handwritten signature in blue ink, reading "Gustav Nossal". The signature is fluid and cursive, with a long, sweeping underline that extends to the left.

Sir Gustav Nossal AC CBE

“It is often gifts in Wills that ensure brilliant discoveries made at the bench are translated to the bedside.”

Sir Gustav Nossal

*Sir Gustav Nossal, honorary governor
and patron and former WEHI director,
has made a legacy gift to the Institute.*







The Walter and Eliza Hall Society

When you advise us that you have elected to leave a gift to WEHI in your Will, you'll be invited to join the Walter and Eliza Hall Society. This is our way of personally thanking you for your support of the Institute.

As a member of the society, you'll have the opportunity to attend regular and unique events where you can meet with scientists, hear about life-saving research developments and develop friendships with other like-minded people.

At all times throughout the year, you'll be able to ask questions of our staff and engage with the issues that interest you most. At WEHI, what we do is only possible because of people like you.

Honouring your intentions

When you leave a gift to WEHI in your Will, you are giving a gift to future generations who will benefit from the latest medical research and world-class treatments.

Our commitment to you is that our researchers will continue to take on the big, challenging health issues facing Australians, working diligently and collaboratively for as long as it takes to deliver outcomes that improve the lives of people in the community.

WEHI researchers work on cancers including blood, breast, bowel, lung, ovarian and stomach cancers.

We also work on rare diseases; immune disorders such as diabetes, asthma, multiple sclerosis, rheumatoid arthritis and coeliac disease; infectious diseases such as hepatitis, tuberculosis, malaria, HIV; and healthy ageing research including Parkinson's and dementia.

Your bequest could provide a scholarship or fellowship to support the work of a scientist in a particular area or you may prefer to direct your gift towards the purchase of critical new laboratory equipment. If you wish, you can direct your gift to a specific area of research. Alternatively, you may prefer to leave it up to the director to distribute the funds to the area of most need at the time.

We recognise that leaving a legacy gift is potentially the largest giving decision you will make and we want you to be completely satisfied that your gift will be used in a way that best suits your intentions. With this in mind, we welcome the opportunity to speak confidentially with you to discuss the options that are most aligned with your vision and passion.

“Medical research provides our community with hope. Supporting one researcher and providing them with funding certainty will help tens of thousands of people in the future.”

John Dyson, Dyson Bequest trustee

Our promise to you

When you leave a gift in your Will to WEHI:

- Your loved ones always come first
- We will always respect your privacy
- We will answer your questions honestly and quickly
- We won't put you under any pressure; this is a big decision to be made in your own time
- You don't have to tell us your decision; we respect your right to privacy
- You choose how your gift is used; we will use your gift wisely and effectively
- We will give you the opportunity to connect with the work we do, and you choose how and when we communicate with you
- You have the right to change your mind at any time
- We will handle the wishes of your estate with the utmost care.



Kate Summers (right), trustee of a large bequest (Peter and Julie Alston Fellowship) with Professor Kate Sutherland, the recipient of the first fellowship allocated as a result of this bequest.

Your questions answered

Do I have to be wealthy to leave a gift in my Will?

Not at all. All gifts received, no matter the size or the amount, contribute to the important work and research conducted at WEHI. Whatever you can afford will be used for something important and tangible.

Including a gift to WEHI doesn't have to affect how much money you need to provide for old age. Your estate is calculated on whatever is left after you die. And, if you specify your gift as a residuary gift, it will only be paid after all other gifts you leave to your loved ones have been fulfilled.

Wouldn't it be better to donate now rather than later?

Both options are welcomed. Many people who leave a legacy to WEHI also support our research through donations during their lifetime. Others use their Wills to support our scientists and their important research for the first time.

What will my family think?

Your Will is a reflection of what matters to you, and for most people, that is their family and friends. We believe you should look after the people you care about before you consider a gift to WEHI or other charity.

Can I choose how my gift will be used?

Yes. Most people leave their gift without specific conditions so that it can be used wherever it will have the greatest effect. Given the nature of medical research, it can be hard to predict where that might be in the years ahead.

However, if there is a particular area of research that has special significance for you, we are more than happy to discuss the different options available.

Can I add a gift to an existing Will?

In most cases, yes. You can use a codicil to add a gift to an existing Will, or to change an instruction in it. We recommend you use a solicitor to do this to make sure it is legal and fits with the other provisions and gifts in your Will.

Do I need to tell WEHI about a gift I'm leaving?

You don't have to, but telling us provides us with the opportunity to say thank you, and to keep you informed of our work. It also enables us to understand the reason behind your gift and how you'd like it to be used. Rest assured, your privacy will be respected.

What if I change my mind about leaving a gift to WEHI?

We understand that circumstances can change. You are free to change your mind at any time.

Dr Michal Pasternak working on a microscope at WEHI's Centre for Dynamic Imaging. The Alan GL Shaw Bequest enabled WEHI to establish this world-class imaging facility.



Inspiring stories of philanthropy

Discoveries need passionate donors. Here we share the stories of passionate bequestors and what inspired them to leave a gift to the Institute.

A shared mission

Helen and Michael Taafe

When Helen and Michael Taafe were planning their estate, they knew the type of beneficiaries they wanted to support. The recipients should be in the medical field, have a holistic vision, and make a significant contribution to Australian and global society.


“We did our research, but it was an easy choice,” said Helen. “The Walter and Eliza Hall Institute has a vision that shines, and a mission that encapsulates everything we were looking for.”

“It’s an organisation that makes you proud to be Australian. We wanted to make a difference and that’s why we selected the Walter and Eliza Hall Institute.”

Inspired by dedication and success

“On paper the Institute is impressive but after meeting then director, Professor Doug Hilton AO we realised why the Institute stands out above the rest,” said Michael. “His dedication and outstanding leadership qualities were inspiring. The organisation’s work ethic is second to none. The executive team, scientists and staff endeavour with much success to uncover the secrets of medicine and science, while working together harmoniously.”

By leaving a gift in their Wills to WEHI, Helen and Michael are contributing to the future success of Australian medical research.



Helen Taafe (left) and her husband Michael said WEHI's mission encapsulated, "everything we were looking for".

"It's an organisation that makes you proud to be Australian. We wanted to make a difference and that's why we selected the Walter and Eliza Hall Institute."

Helen and Michael Taafe

Gifts of gratitude

Noël Sumner and Roz Edmond

Noël Sumner and Roz Edmond each have a strong personal connection to WEHI.

They are two of more than 30 million people worldwide to receive a life-changing drug, discovered by WEHI researchers, which played a key role in their treatment and recovery.

Professor Don Metcalf and his colleagues discovered and developed colony stimulating factors (CSFs), which are used to boost the infection-fighting white blood cells in people undergoing cancer treatment. Since these early trials, an estimated 30 million people have been treated with CSFs.

First-hand experience

Noël said that when she was diagnosed with breast cancer in 1992, she was told her life expectancy was not good.

After her cancer diagnosis, Noël was offered an experimental high-dose chemotherapy trial. “My participation in this trial was only made possible – and tolerable – by Professor Don Metcalf at WEHI,” she said.

The experience brought Noël into closer contact with WEHI and inspired her to leave a gift in her Will, so that medical research could continue improving the health outcomes of future patients.

“As I learnt more about Professor Metcalf and the discoveries of the many research scientists at WEHI, I was inspired to leave a gift in my Will to this amazing Institute so that other lives may be extended or saved,” Noël said.

“The research being done at the Walter and Eliza Hall Institute is incredibly important... I’m proud to contribute what I can to help.”

Roz Edmond, bequestor

Motivated to help

Roz embarked on a relationship with WEHI as a supporter and donor as a result of her own experience with CSFs.

“I’d had breast cancer and after every chemotherapy session I was being given CSFs,” she said.

In 2014 she visited WEHI and met Professor Metcalf, visiting his laboratory and thanking him for the work that had underwritten her recovery. In recognition of the impact that his discovery has had on her life, Roz has confirmed her intention to leave a gift in her Will.

“The research being done at WEHI is incredibly important. The place hums with intense curiosity and dogged determination, and I’m proud to contribute what I can to help,” Roz said.

“I’m a donor because I can be, because it is important to support these young students, these postdocs who are bursting with ideas.”



*Noël Sumner (left) and
Roz Edmond were
inspired to leave a gift to
WEHI in their Wills.*

Professor Clare Scott is researching new treatment options for patients with rare cancers. Professor Scott's research is supported by a gift from the estate of Tricia Gowdie.



A lasting legacy

Patricia (Tricia) Ann Gowdie passed away in October 2014 from a rare appendiceal cancer, at age 43. As her family recalled, Tricia “loved life with a fierce passion and dealt with her situation with great determination and courage”.

Rare cancers account for 30 per cent of cancer deaths in Australia. People with rare cancers are more likely to die from their disease than people with more common cancers, due to late diagnosis or lack of treatments. However rare cancer research is still largely underfunded.

Remembering a sister and daughter

Tricia expressed a wish to make a donation from her estate to further rare cancer research. In honour of a beloved daughter and sister, Tricia’s family chose WEHI as the beneficiary of this legacy gift. The Gowdie family’s hope is that other families will be spared losing a loved one under such tragic circumstances.

The gift from Tricia’s estate is helping Professor Clare Scott and her colleagues to select the best treatments for patients diagnosed with rare cancers. A major objective of this research is to recommend effective treatments for rare cancer patients using existing anti-cancer medications.

Leaving your mark

Gifts in Wills can help make new treatments possible by injecting funds into sometimes underfunded research. The impact of gifts in Wills can be long-lasting; helping to save lives and honouring the memory of loved ones.



Tricia Gowdie (right) “loved life with a fierce passion”.

Preparing your Will

Whether you are preparing your first Will, or updating an existing Will, it is easy to include your wish to leave a gift to WEHI.

It's best to visit a solicitor to make sure your wishes for your family and any charities won't be misinterpreted later on.

Different kinds of gifts

- Residuary gifts are made from whatever is left over from your estate once gifts of money and specific items have been distributed. You can give the whole of the residue to a person or a charity, such as WEHI, or a portion of it.
- Pecuniary gifts are specified sums of money.
- Specific gifts are possessions, for example shares, artwork, a house or jewellery items.

Tips to help you make your Will

Estate planning is about ensuring that your assets will be directed to the people and causes that you wish to support. We encourage you to seek professional legal, estate planning and financial advice.

- Use a solicitor or legal professional
- Appoint an executor/s to ensure your wishes are carried out as per your Will

Adding a codicil to your Will

If you already have a Will you can still support WEHI by adding a codicil. Your solicitor or legal advisor will assist you to complete a codicil form.

You may wish to advise us that you have left a gift in your Will to WEHI by:

- Writing a letter to WEHI advising of your intention
- Providing a copy of the codicil or your Will
- Providing a confirming letter from your solicitor

Recommended wording in making a bequest to the Walter and Eliza Hall Institute (WEHI)

"I(Print full name)

of(Full address)

bequeath to The Walter and Eliza Hall Institute of Medical Research (WEHI)
(ABN 12 004 251 423)

a) the sum of \$

OR

b) all my residuary estate (*the balance remaining of your estate to the Institute after family, loved ones and expenses are provided for*). The receipt of the Walter and Eliza Hall Institute of Medical Research (WEHI) Company Secretary or other authorised officer shall be sufficient discharge to my executor for the bequest.

OR

c) a% share of the residue of my estate

OR

d) Asset or assets (*such as a life insurance or superannuation policy, a trust or named fund or assets such as shares, property, art collections and/or other capital assets*). Please list each item (*include property folio number and address*)

If any of my nominated beneficiaries predecease me, the bequest shall not fail but I give the share of my deceased beneficiary to

.....
(full name of person or organisation and identifying details).

We respect your privacy. All bequest enquiries, discussions and notifications are handled in the strictest confidence.

Confidential enquiries can be directed to our Future Giving team:

Christine Diamond

03 9345 2929

diamond.ch@wehi.edu.au

Walter+Eliza Hall





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