

ST DAVID'S ANGLICAN PARISH OF BURNSIDE

PARISHIONER BEQUESTS GUIDANCE

What is this document about?

This document has been developed at the request of parishioners to provide guidance for those parishioners considering making a bequest to the Church in their will.

Disclaimer

The Anglican Parish of Burnside makes no claim to provide legal advice and parishioners wishing to make a bequest to the church should always seek qualified legal advice before proceeding with their intent to make a bequest to the Church.

Bequests to the Church

In the context of the Church a bequest is a gift given to a church or other religious organisation to support its mission, or for other purposes supporting parish life.

A bequest may be made directly to the Synod of the Diocese of Adelaide, or the will of the deceased may stipulate that the bequest has been made for the benefit of the parish (such as the Parish of Burnside) or for a Church Agency, such as Anglicare, the Anglican Board of Missions, or another Agency.

When bequests are made to the Synod for the benefit of a parish or agency the Synod becomes the trustee of the bequest and must ensure that the wishes of the donor are followed. Day to day management of bequests to the Parish of Burnside is managed by the Parish Council but is undertaken under the oversight of the Diocese.

There are several types of bequest and parishioners are encouraged to seek legal advice as to the type of bequest they wish to make.

Considerations

Parishioners should consider the following to determine what type of bequest they wish to make.

For example, do you want:

- The parish (being the Parish Council) to be free to exercise discretion on how best it uses your bequest?
- Your bequest to be directed to the Parish Building Fund for the development and maintenance of parish buildings?
- Your bequest to be directed to evangelism work or another specific Ministry to be undertaken by the Parish?
- Your bequest to be directed to a specific Church agency, such as Anglicare, BCA, or other Church agency, in which case the specific agency would manage the bequest?

If you wish your bequest to be directed to specific aspects of church life, then you should ensure that is clearly specified in your will. Such a bequest is best made allowing for appropriate discretion in implementation so that your wishes can be implemented.

Very Important

If you are considering a bequest to the Church, you are encouraged to discuss with the Parish Priest and Church Wardens as to what type of bequest might benefit the Church before making or amending your will. This will ensure that your wishes can be met in the best way.

**St David's' Church
Anglican Parish of Burnside**

BEQUESTS GUIDANCE for PARISHIONERS

Acknowledgement

All bequests to the Parish of St David's Church Burnside are appropriately acknowledged and recorded in the bequest book located in the Church.

Other things you might like to think about

Is your bequest for a specific monetary value?

Can the Church use the capital value of your bequest, or do you wish the money to be invested and the Church draw on the interest or growth of the investment?

Are you bequeathing stocks and shares? If so, how are these to be managed, and how should the Church use any growth in the value of those stocks and shares?
