

A photograph of an elderly couple embracing and laughing in a field at sunset. The woman is on the left, wearing a denim jacket, and the man is on the right, wearing a light blue shirt. They are both smiling broadly and looking towards the right. The background is a soft-focus landscape of rolling hills under a warm, golden light.

A Will to beat Heart Disease

A guide to giving
the gift of heart health
to future generations



Heart
Research
Australia

Contents

- 2 A gift for the future
- 3 Catherine's story
- 3 Peter's story
- 4 How a gift in your Will can help
- 5 Fighting for every heartbeat
- 5 About heart disease
- 6 How to leave a gift in your Will
- 6 Our commitments to you
- 7 Breakthrough Partners
- 8 Frequently asked questions
- 9 For your solicitor
- 10 Thank You
- 10 Contact Details



A gift for the future

At Heart Research Australia we believe that heart research can reduce the devastating impact heart disease has on families and the community. We believe in our researchers, mostly practicing cardiologists, who are passionate about finding ways to improve prevention, diagnosis, and treatment of heart disease. We believe that the outcome of their research will keep families together for longer, and that's exactly why Heart Research Australia supports the first stages of heart research projects.

First-stage research does not often qualify for government funding. Heart Research Australia provides seed funding so researchers can get the results needed

to qualify for large government grants and transform their research into life-saving treatments. With the support from Heart Research Australia's generous donors we can get these projects off the ground so our researchers can find ways to improve the heart health for future Australian generations.

Thanks to increasing advances in heart research and treatment, the death rate from heart disease has been steadily declining. However, heart disease still remains the single leading cause of death for all Australians.

A gift in your Will, no matter how large or small, is one of the most valuable ways to help pioneering heart research continue well into the future.

Catherine's story

"I have been a regular donor to Heart Research Australia for several years. My father and several grandparents died early due to Cardiovascular Disease (CVD) so I have a special interest in the causes, lifestyle factors, treatment and prevention.

As a high school PDHPE teacher, I am aware that CVD is still the major cause of death in Australia and as such affects a majority of the population, either directly or indirectly. I believe that research into prevention and early intervention is vital so after reading and hearing more about the research, focus and clinical stories from Heart Research Australia, I decided that I needed to take my commitment to another level and include a bequest in my Will.

It is a real privilege to be able to provide financial support to such an invaluable organisation, which is devoted to ensuring a better quality of life for Australians of all ages, now and into the future."

Catherine Gray



Peter's story

"I had a mitral heart valve operation back in 1995 at Royal North Shore Hospital. Not only was I very happy with the result, I was also interested and impressed by the innovative research being undertaken by Heart Research Australia – or, as it was known back then, – the North Shore Heart Research Foundation.

I decided to support through regular contributions. My wife and I also made the decision to include a gift in our Wills to Heart Research Australia.

Advances in heart research made my successful heart surgery possible. Now I'm still enjoying good health, and I'm still running! It is wonderful to know that my legacy will help fund future advances and could save lives."

Peter Gentry

How a gift in your Will can help

Leaving a gift in your Will to Heart Research Australia is one of the most valuable ways you can help ensure that breakthroughs in heart disease continue well into the future.

Some outstanding examples are the SALAMI (Stents as an Alternative to Lytic therapy in Acute Myocardial Infarction) procedure; a trial whereby stents are used as an alternative to clot-busting drugs for the treatment of heart attacks, and ETAMI (Early Triage of Acute Myocardial Infarction); a protocol invented to assess and triage patients in the ambulance, using ECG diagnosis and transmitting results directly to the hospital. ETAMI saves significant time (up to 100 minutes) from incident to treatment and saves heart muscle from irreversible damage by opening the coronary artery earlier.

The combination of ETAMI and SALAMI reduced death rates from heart attacks at Royal North Shore Hospital from 30% to 2% and is now standard practice in hospitals around Australia.

The positive outcomes of the ETAMI and SALAMI programs were made possible due to funding from Heart Research Australia's donors and from Gifts in Wills.

Celebrity chef, Alessandro Pavoni, has first-hand experience of these procedures.

“After my first heart attack, I kept hearing the doctors use jargon that I later learnt were procedures and methodologies that Heart Research Australia had funded.

That's when I first understood that I owed them my life”

Alessandro Pavoni
*Ambassador of
Heart Research Australia*





Fighting for every heartbeat

Heart Research Australia was established in 1986 by a group of cardiologists who recognised the need for more research to reduce the high mortality rates due to heart disease. Since its inception it has funded first stage innovative heart research that has led to better prevention, diagnosis and treatment. Although there has been a decline in these mortality rates, it is still our leading cause of death and there is still so much more to do.

Heart disease will impact many of us; ourselves, our loved ones and our friends. So, we'll keep fighting to fund further research to keep families together for longer.

About heart disease

Heart disease is a term for several diseases and conditions. Cardiovascular disease generally refers to conditions that involve narrowed or blocked blood vessels that can lead to a heart attack, chest pain (angina) or stroke. Other heart conditions, such as those that affect your heart's muscle, valves or rhythm, also are considered forms of heart disease.

Some conditions, such as heart defects and family history, tend to be genetic and cannot be prevented. Other factors are known to increase the risk of developing heart disease. These include smoking, diabetes, high blood pressure, high cholesterol, lack of exercise and being overweight.

Keeping your heart healthy, whatever your age, is the most important thing you can do to help prevent and manage heart disease, but even then, there are other factors we don't yet know about that can impact the heart.



How to leave a gift in your Will

Making a legally valid Will is the best way to ensure that your assets are protected and distributed according to your wishes. We understand that loved ones come first. Once they are provided for, you may wish to leave a gift that will help advance heart research.

No matter how big or small, all donations to Heart Research Australia make an incredible positive difference for the future of heart disease.

Choosing the type of gift you would like to leave depends on your wishes and circumstances. We recommend that you seek independent legal advice when writing or updating your Will.

TYPE OF GIFTS

Percentage: A proportion or percentage of your Estate

Residuary: The remainder of your Estate, once all other provisions, debts and legacies have been fulfilled

Pecuniary: A gift of a fixed amount of money

Specific Asset: A fixed asset such as shares, real estate, or other particular items of value

Our commitments to you

Thank you for considering leaving a gift in your Will to Heart Research Australia. We understand that it is a big decision to make. These are our commitments to you:

- We understand that family and friends are most important and appreciate that your loved ones will be your priority when making your Will.
- We will never put you under any pressure. It is your decision to make whenever the time is right for you.
- You have the right to change your mind at any time.
- We recognise and respect that your Will is completely personal to you and we will never share this information without your explicit permission.
- We will use your gift carefully and cost-effectively so that it has the greatest potential to achieve our mission of making breakthroughs in heart disease happen.
- We will handle whatever gift you leave us efficiently and with sensitivity and respect.

Breakthrough Partners

Breakthrough Partners are a group of our most dedicated supporters who have decided to leave a gift in their Will.

The group was established to acknowledge the generosity of the people who have remembered Heart Research Australia in their Will.

If you have left a gift in your Will to Heart Research Australia, then we would welcome the opportunity to thank you. We will keep you up to date with what is happening at Heart Research Australia as well as the latest research we are funding. Our Breakthrough Partners receive invitations for special events and the opportunity to meet with our researchers.



Join me and become a Breakthrough Partner

“As someone who has directly benefited from the research Heart Research Australia has funded, I’m living proof that research saves lives.

I decided to become a Breakthrough Partner by including a gift to Heart Research Australia in my Will, because I wanted to give something back to the organisation that helped give me a second chance at life.

It gives me a lot of satisfaction to think that, long after I’m gone, I can still play a part in future breakthroughs in heart disease.

I hope you’ll join me in becoming a Breakthrough Partner by including Heart Research Australia in your Will.

Everyone has their own reason for wanting to beat heart disease. Together, we can make it happen sooner.”

Chris Russell - *Gifts in Wills Ambassador*

Frequently asked questions

Why make a Will?

Making a clear, legally valid Will is the best way to ensure that your assets are protected and distributed according to your wishes.

Do I need professional advice to make a Will?

We suggest that you seek independent legal advice from your Solicitor, State or Public Trustee or Trustee Company when preparing this important document. It is recommended that you review your Will every seven years to ensure it reflects your changing circumstances and wishes.

Why should I leave a gift to Heart Research Australia?

For the past three decades we have funded pioneering first-stage research aimed at identifying new and better ways to diagnose, treat and prevent cardiovascular disease. Almost half of our income comes from Gifts in Wills and these kind gifts play a crucial part in paving the way for new discoveries and more effective treatments for heart disease.

With a gift in your Will, you could help us make the next leap forward and spare more families the anxiety, fear and loss caused by heart disease.

What if I don't think I'll have enough money for a gift to charity?

We know that family and loved ones must always come first. To ensure that they are provided for, you may like to consider leaving a residuary gift, or gifting just a small percentage of your Estate. Even a gift as small as 1% of your Estate will help us fund future heart research.



I would like to leave a gift in my Will to Heart Research Australia. What do I need to do?

You will need to decide the type of gift you would like to leave such as a specific amount (pecuniary gift) or a percentage of your Estate (residuary gift) and tell your solicitor. Make sure to use our correct name (Heart Research Australia) and our ABN number (62 002 839 072).

continued next page...

Frequently asked questions *continued*

I already have a Will, can I make a change simply?

Minor changes can be accomplished with an amendment to an existing Will. More substantial changes may require the drafting of a new Will. Whether the changes are minor or extensive, always consult with your solicitor when considering a revision.

I'd like my bequest to be used for specific research. Can I do this?

Bequests for 'general purposes' will allow us the flexibility to direct the funds where they're most needed, as priorities for research can change over time. However if there is an area that you are particularly interested in then please discuss your intentions with us so we can help achieve your wish.

How can I make my gift tax-effective?

Talk to your Solicitor about ways you can structure your Will so that more of your Estate can be directed towards supporting the charities of your choice, rather than being eaten up by taxes. Charities like Heart Research Australia which have DGR (Deductible Gift Recipient) status do not have to pay Capital Gains Tax. This has important implications if you are thinking, for example, of gifting a portion of your shares, because shares that are transferred directly to a charity with DGR status are not subject to Capital Gains Tax.

If I leave a gift to Heart Research Australia in my Will, do I need to tell you?

No you don't, but we would welcome the opportunity to hear from you if you have left a gift or are considering a gift. This will give us the opportunity to thank you and to keep you informed about the latest developments in the fight against heart disease.

Please note that we will never put you under any pressure and naturally, you have the unreserved right to change your mind at any time.

For your solicitor

It is important to use the correct wording to ensure that your wishes are carried out correctly.

Depending on the type of gift you would like to leave, you can use the following wording:

*“I give, free of all duties and taxes to
Heart Research Australia (ABN 62 002 839 072)*

_____ % of my Estate

the rest and residue of my Estate

the sum of \$_____

the following assets: _____

*to be used to support research into cardiology
in such manner as the Board of Directors may
determine and I direct that the receipt of the
Chief Executive Officer or other authorized officer
of Heart Research Australia shall be sufficient
discharge to my trustees.”*



Thank You for thinking of us

If you have left a gift in your Will or are considering a gift to Heart Research Australia, we want you to know how much we appreciate your thoughtfulness. Your generosity can help our researchers transform their ideas into life-saving treatments that can benefit future generations.



Heart
Research
Australia

PO Box 543, St Leonards NSW 1590

Tel: (02) 9436 0056

Email: bequest@heartresearch.com.au

www.heartresearch.com.au