



TRINITY
GRAMMAR
SCHOOL, KEW

Frequently Asked Questions

1. What is a bequest?

A bequest is a gift that is passed on by means of your Will. It is an instruction contained within a Will and specifically reserves part or all of an estate to a particular beneficiary, whether a person, organisation or charity. A bequest is an opportunity for you to make a tangible and lasting gift without affecting your financial situation during your lifetime.

Often a bequest is the largest gift that someone will ever make but also may be relatively modest. Whether large or small, a bequest can help reflect in death what has been important to you in life. It can serve as a testimony to your values and beliefs.

2. What is the easiest way to make a bequest?

If you already have a Will, you may simply add a codicil to include Trinity Grammar School, Kew – a straightforward and inexpensive procedure. If you do not have a Will, we recommend that you seek professional advice about establishing one.

3. What is a Codicil?

A codicil is a document used to make any alterations to your existing Will. For this document to be legally valid, it must be signed and witnessed with the same formalities as those used in the original Will's preparation.

4. Whom should I consult to write my Will?

After discussing your intentions with your loved ones, it is important to consult a solicitor when writing your Will. This will ensure that you observe all the necessary legal requirements so that your estate is appropriately disbursed according to your wishes. From time to time, legal regulations relating to both Wills inclusion and exclusion are modified and your solicitor will be able to offer advice on such modifications.

5. How often should I update my Will?

Your relationships can change, and this may affect how your estate will be distributed, it is, therefore, advisable to regularly review your Will to accurately reflect your current situation such as the sale of property, having grandchildren and so on.

6. Why leave a Bequest to Trinity Grammar School, Kew?

Once you have taken care of those closest to you, including Trinity Grammar School in your Will will have a positive impact on Trinity Grammar School and its students. By leaving a bequest, you are recognising the value the school provides to the wider community through our personalised approach to the education of our students inspiring them to embark on their own adventure, leaving behind a lasting and positive legacy.



7. Is the school really interested in receiving a modest bequest?

Yes, certainly. Over time, and with some financial management, funds invested distribute many times their initial capital value to assist students and the school. Modest gifts will have a substantial impact on assisting those in financial need. The school celebrates the generosity of all who leave a gift no matter the size. In order to become a member of the Trinity bequest society, the Tunga Society, a bequest of \$2000 or more is required.

8. When including TGS in my Will, do I need to inform the school?

No, but by informing the school, the school has the opportunity to thank you in your lifetime and ensure that you are aware of the various options available when leaving a gift to the school. Also, you will be invited to join the Tunga Society; however, the school will always keep your bequest confidential if this is your wish. Should you have any queries regarding the inclusion of Trinity Grammar School in your Will, it is suggested you contact our Development Manager, Hayley Galloway to discuss.

9. What assets can I pass on to the school?

There are various ways that you may gift your possessions and assets including leaving: a specific sum of money; a percentage of your estate; the residue of your estate after family and other interests have been provided for; specific property, pieces of art, shares or insurance policies; and family memorabilia.

10. Am I able to choose how my bequest will benefit the School?

Yes, you may wish to direct your bequest to our scholarship or building funds; or there may be a specific academic, cultural or sports areas that have a special interest for you; on the other hand, you may choose for the school to direct your gift to the area that it considers to be of most need.

11. What is the Tunga Society?

In 2015 Trinity Grammar School established the Tunga Society to honour and thank those in their lifetime who have chosen to leave a bequest to Trinity Grammar School. Today our Tunga Members are made up of Old Trinity Grammarians, current and past staff and friends of the school. Members are invited to key events as well as the annual Tunga Society luncheon attended by the Principal and other key staff of Trinity Grammar School.

The Tunga Society plays a very significant role in helping underpin and secure the future of Trinity Grammar School, Kew – providing a gift to the school is a wonderful means of leaving a lasting legacy.

*Membership of the Tunga Society is open to anyone who has made a bequest of \$2000 or more to Trinity Grammar School.