



MONASH  
University

WHAT LEGACY  
WILL YOU LEAVE?

MONASH  
PLANNED  
GIVING

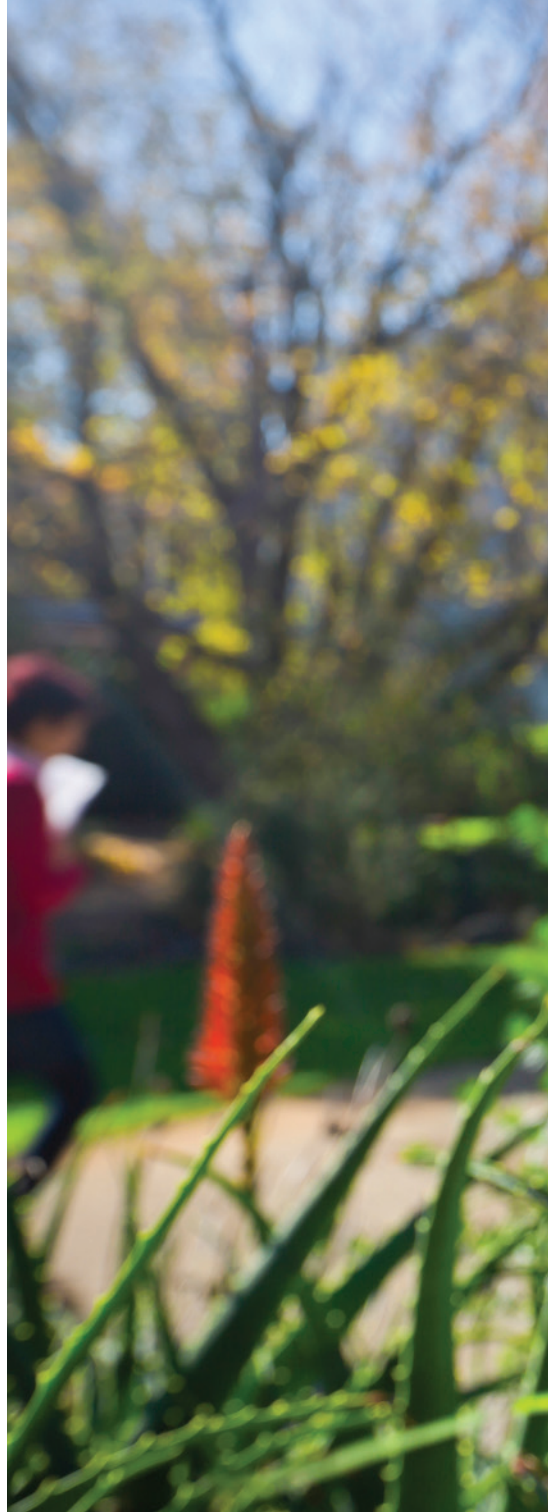
# A PLANNED GIFT TO MONASH CONTINUES YOUR LEGACY

There are many ways to leave your mark on the world. You can build companies, lead projects or mentor teams. You can raise children, write a book or cultivate a garden.

Perhaps you have done some of these, or all of these, or more. Have you also considered leaving a gift to Monash in your will?

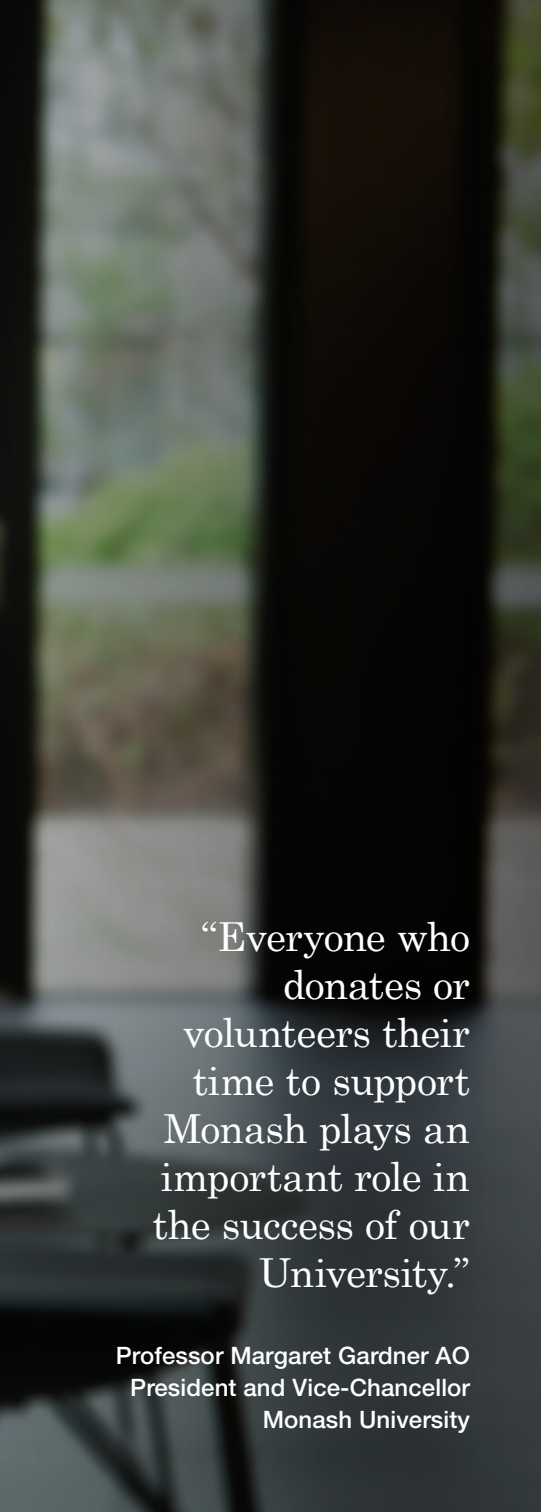
A planned gift to Monash could support a student in need. You could be part of world-leading research, or help talented youth achieve their full potential.

It's never too early to start thinking about what you could leave behind – now could be the perfect time to create your legacy.









“Everyone who  
donates or  
volunteers their  
time to support  
Monash plays an  
important role in  
the success of our  
University.”

Professor Margaret Gardner AO  
President and Vice-Chancellor  
Monash University

## LET THE GOOD WORK LIVE ON

In just 50 years, Monash has become Australia’s largest university with a record for excellence. Our strengths are our global outlook, our genuine belief in challenging the status quo, and creating a positive impact on society.

If you have been touched in some way by Monash – perhaps while you were a student, through your interactions as an alumni, while you were working with us as staff, or even as a member of the community – we invite you to consider leaving a bequest so we can continue to excel.

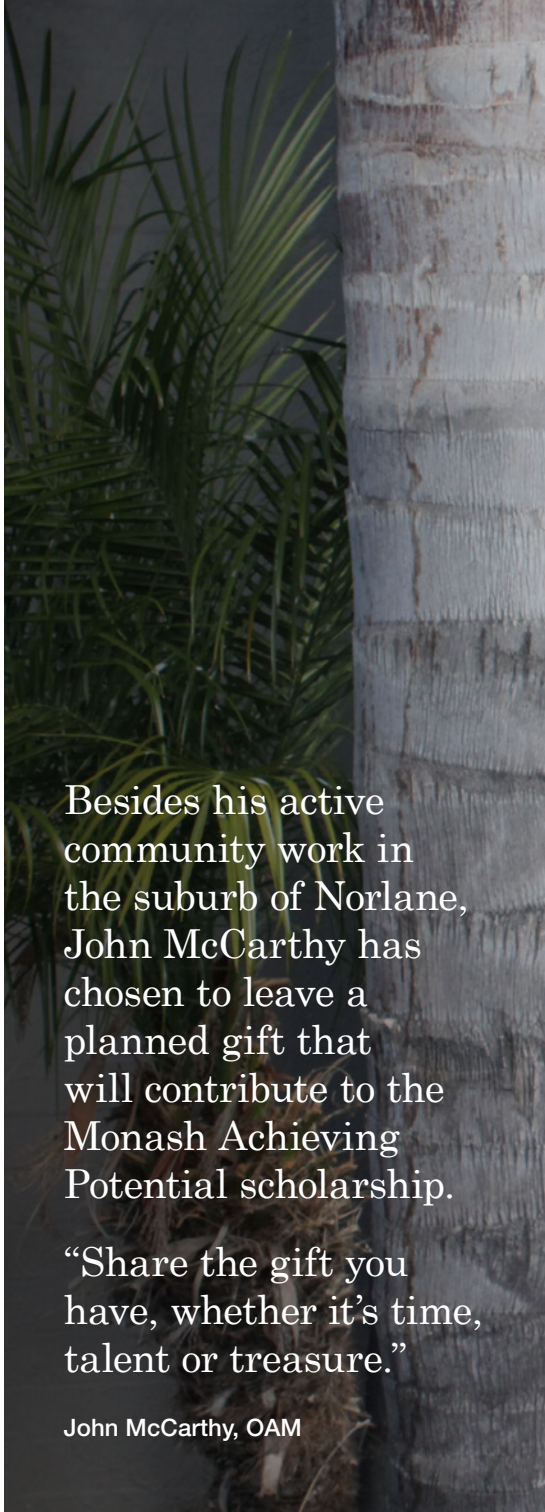
We are committed to addressing the greatest challenges of our age. When you support Monash, you support enterprise, diversity and a passion for innovation that will shape the world.

## WHAT IS A PLANNED GIFT?

A planned gift, or a bequest, simply means you include us as a beneficiary in your will.

We value every gift, no matter what shape or amount. It could include:

- A portion of your estate
- A sum of money
- Property
- Stocks and shares
- Works of art or valuable collections
- A life insurance policy, annuities or trust.




Besides his active community work in the suburb of Norlane, John McCarthy has chosen to leave a planned gift that will contribute to the Monash Achieving Potential scholarship.

“Share the gift you have, whether it’s time, talent or treasure.”

John McCarthy, OAM





“When I received the answer I got this scholarship, I actually just cried. This scholarship changes the path of my life.”

Pouya Heidari is the 2016 recipient of the Asylum Seekers Scholarship and is currently studying a Bachelor of Science at Monash.



# WHAT GIFT CAN YOU GIVE?

Leaving a planned gift is a very personal decision. Whether you would like to establish a fund in your name or in the name of a loved one, or leave your gift anonymously, it would be our pleasure to discuss your preferences with you.

## A GIFT OF A SCHOLARSHIP

Many of the contributions we receive go to our students via scholarships, rewarding excellence or helping disadvantaged high-achievers accept their place with us. Your planned gift enables bright, young individuals to achieve their ambitions, regardless of their hardships – whether it be broken homes, financial strife or Indigenous prejudice.

## A GIFT TO RESEARCH

Everything we do is driven by an unrelenting desire to improve the world. Your generosity could further support our understanding of superbugs, finding a solution for global warming, or even help us develop more sustainable communities.

## A GIFT TO ADVANCE FACILITIES

From our beginnings as a traditional institution, Monash has evolved into a state-of-the-art knowledge centre. We are committed to creating a vibrant hub where students and researchers from almost every discipline come together to collaborate and drive the ideas that will shape our future.

## AN OPEN GIFT

If you are unsure which area to support, you can direct your planned gift to a specific faculty or to the University in general, and we will direct your contribution to the area most in need.

## THE DAVID WINSTON TURNER ENDOWMENT FUND

How can a stockbroker contribute to mental health research? If you're David Winston Turner, you make a bequest. As an economics graduate of Monash University, David left a gift in his will in the form of the David Winston Turner Endowment Fund.

"David was a proud alumnus of Monash," said the trustees of the fund, "who was also aware of the University's internationally recognised research in the mental health field."

As a result, the trustees pledged \$5.2 million – one of the largest philanthropic donations in the University's history to date – to support mental health research at Monash.

A large part of the gift will go towards the establishment of the Monash Institute of Cognitive and Clinical Neurosciences – the world's first research institute dedicated to addressing untreated brain disorders including ADHD, autism, drug addiction and memory loss.


Their work is already pioneering novel solutions, such as using virtual technology to reverse gambling addictions, and developing markers to detect brain abnormalities.





“The generosity of graduates like David Turner is often the difference between a good university and a great university.”

Professor Margaret Gardner AO  
President and Vice-Chancellor  
Monash University



“It’s easy to associate philanthropy with ‘being rich’ but actually all of us can simply make the University a beneficiary of our will.”

Professor Farzad Sharifan  
Chair in Cultural Linguistics  
Monash University  
Bequest: The Farzad Sharifan  
PhD Scholarship



## THE FARZAD SHARIFIAN PHD SCHOLARSHIP FOR INTERNATIONAL STUDENTS

Professor Farzad Sharifian arrived in Australia in 1998 with \$2000 in his pocket – the proceeds of selling his car in Iran. He went on to pursue his university studies with the assistance of scholarships from the Australian government and is now a pioneer in the field of cultural linguistics.

As a former international student, Professor Sharifian understands the challenges of leaving family and home behind to pursue your ambitions. His bequest to establish The Farzad Sharifian Scholarship is designed to assist similar students, who often come from countries whose governments cannot afford to support them in their studies.

“I look at my gift as a continuation of my life’s work,” he says. “That will see Monash University’s international reputation for ground-breaking research continue for years to come.”

## THE ADA BOOTH COLLECTION

Some physicists like astro particles. The late Ada Booth, a renowned physicist, also loved the arts. Over her lifetime, Ada collected an incredible range of Slavic literature and other rare books, a treasury of all things Ukrainian and Serbian.

As requested in her will, Ada's personal library was donated to Monash University together with a \$10 million trust fund dedicated to the library's development.

Today, the Ada Booth Collection is Australia's largest collection of Slavic literature – a magnet for graduate research students studying Slavic linguistics, and Russian, Ukrainian and Eastern European history.

The trust fund has enabled Monash to purchase electronic databases to add to the existing material. Ada's passion for the arts continues to live on through her generosity, and will continue for generations.





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“The Monash Library’s collection of Slavic materials was already very good – Ada’s generosity made it outstanding.”

Professor Marko Pavlyshyn  
Head of the School of Languages, Cultures and Linguistics  
Monash University

The New Horizons building houses more than 400 scientists and engineering researchers from Monash and CSIRO, dedicated to advancing Australia's next-generation manufacturing capabilities.





# HOW DO YOU START GIVING?

## 1. DECIDE ON A GIVING LEVEL THAT'S SUITABLE TO YOU

After considering the needs of your family and loved ones, you can make a bequest of the remaining assets to Monash. Alternatively, you can make a specific bequest, which could include a set amount of money, a portion of your estate or valuable collections you'd like to donate.

## 2. CONSIDER YOUR INTERESTS

Are you interested in music, art or science? Perhaps you would like to support a certain research area or community group. When you leave a planned gift to Monash, you can specify how you would like your funds to be used, or let the University allocate the funds on your behalf.

## 3. PREPARING YOUR WILL

It's simple. You can include a bequest to Monash when you write your will. If you already have a will, you can add a codicil (a legal provision) to include the bequest. For assistance on will writing and amendment, we recommend that you consult a solicitor, a trustee or accredited wills and estate specialist.

**Here is an example of the type of language you can use:**

*"I bequeath Monash University of Clayton, Victoria 3800, ABN 12 377 614 012, the sum of \_\_\_\_\_ dollars {for the percentage of the residual estate}, to be applied for the purposes of \_\_\_\_\_ (or) by Monash University in such a manner as its Directors may determine. I direct that the receipt in writing of an authorised officer of Monash University shall be deemed proof of payment."*

For more information, please speak to our planned giving team. We would love to talk you through your gift intention so that we are able to honour your wishes for years to come.

## BE PART OF THE MATHESON SOCIETY

If you have included Monash in your will or are considering to do so, you will be invited to join the Matheson Society, named in honour of our first vice-chancellor, Sir Louis Matheson. As a member, you will have access to exclusive events throughout the year where you can interact with like-minded individuals who believe in supporting future generations.

### MATHESON SOCIETY BENEFITS

- Receive invitations to Monash events throughout the year, including an annual society function
- Keep track of exciting developments at Monash through our *Thanks* magazine and annual Matheson Society newsletter
- Develop relationships with leading Monash alumni, staff and friends
- Have the opportunity to be included in our honour role
- Join others in creating a legacy of positive change.





Often referred to as the 'parents of Monash University', the Mathesons are fondly remembered for their spirit of community.



## TALK TO US

To find out more about planned giving  
or to book a confidential discussion with  
our planned giving team, please call:

**+61 3 9903 4395** or email us at  
**[giving@monash.edu](mailto:giving@monash.edu)**

Planned Giving  
External Relations, Development and Alumni  
Level 4, 211 Wellington Road  
Monash University, VIC 3800, Australia

**[monash.edu/planned-giving](http://monash.edu/planned-giving)**

**Thank you for considering  
a to gift Monash University.**

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