

TESTAMENTARY BEQUESTS TO THE ROTARY FOUNDATION

Directions for execution of your Codicil

Before you sign

1. Before signing the codicil, obtain your own, independent legal advice concerning this codicil and its effect.
2. Locate your last will and ascertain its **date**.
3. Insert your full name on the first line of the codicil. Then, insert your full residential address on the second line. On the third line, insert the date on which you are signing the codicil.
4. Insert the **date of your last will** on the fourth line.
5. In the body of the codicil, insert the amount of money you are bequeathing to The Rotary Foundation (e.g. US\$1000 or more).

The signing

1. Two witnesses and you must be in the same room before any signing, but the witnesses need know nothing of the document other than the fact it is your codicil. It is desirable for you and both witnesses to use the same pen, because different coloured inks lead to questions as to whether all parties were together and signing at the same time.
2. You and the witnesses need to initial any alterations in margin opposite.
3. You insert your name and sign in ink (or ballpoint) and have the witnesses sign with you in the room. Signatures should be the usual ones and need not be full names. Witnesses should also print their full name and address for possible future reference.
4. Neither the witnesses nor partners must in any way be receiving benefits under the codicil.

After signing and witnessing the codicil

Place the original codicil with your last will, in its safety packet, and return to its safe place with bank, solicitor or whatever arrangement you have.

Complete the **Benefactor Gift Commitment Card**, available from The Foundation or District Rotary Foundation Committee and forward it for recording and 'wings' recognition to:

Rotary International
South Pacific/ Philippines Office
PO Box 1415
Parramatta
NSW 2124

With thanks to:

Rotarian Peter Sochacki
O'Reilly & Sochacki Lawyers
"BGF House" 1 Queen Street
Murwillumbah
NSW 2484
Tel: (02) 6672 2878 Fax: (02) 6672 4990
Email: peter@oslawyers.com.au