



Bequest Pack

The Society

The Royal Western Australian Historical Society (Inc) (RWAHS) was formed in 1926, with the object of encouraging the study, writing and enjoyment of the history of Western Australia in all its cultural diversity. It is a not-for-profit incorporated association. It has a trademark brand name, 'History West', which expresses our vision and assists to better engage with our members and the public at large.

Since its formation, the RWAHS has grown into a Statewide community organisation of around 700 members. Additionally, the Society leads a network of over seventy affiliated historical societies throughout the State, with over two thousand members between them. Over the last hundred years, the RWAHS and its affiliates have been actively involved in advocacy for history and heritage across the State through public campaigns and lobbying.

At its headquarters in Nedlands, the RWAHS has a museum collection with significant costumes and art works, an extensive reference library containing personal papers, a photographic archive and a boutique bookshop of Western Australian history publications. It encourages the understanding of history through its exhibitions, publications, research readings and community talks.

Underlying all the Society's activities is the recognition that history is a vital part of the State's culture. In so doing, the RWAHS is mindful to consider, in all its activities, the incredible cultural diversity that exists within Western Australia's past and present.

Bequests

The RWAHS is a not-for-profit organisation that relies on membership fees, donations, grants, bequests and sponsorship to help preserve and promote Western Australia's history.

Over the years, the Society has benefitted from numerous generous monetary bequests, both large and small, as well as important items for our museum and library collections. The money that has been bequeathed to the Society has enabled us to undertake important conservation work to maintain our collections, enable publications, assist with outreach projects to name but a few.

The following are two examples of how previous bequests have significantly helped the Society:

- \$10,000 from a bequest was set aside for scanning the Society's minute books, plus digitisation and conservation of other Library items.
- A large bequest was used to help with the purchase specialist storage supplies and significantly helped with the cost of moving the collection into its new home at 109, Stirling Highway.

Leaving a bequest to the Society in your will can be a meaningful way in which to have an ongoing impact on bringing history into our lives and ensuring it is not lost. By leaving a gift in your will, you help us to continue sharing the stories that matter, for generations to come. Every legacy, no matter the size, leaves a lasting impact.

Through your generosity, the RWAHS and its members can make sure history is accessible to every Western Australian and that it has a positive impact on the communities in which we live.

Making a Bequest to the Society

Charitable bequests are gifts made to not-for-profit organisations through a will, allowing individuals to support causes after their lifetime, often creating a lasting legacy while potentially reducing estate taxes. These gifts can be a specific sum, a percentage of the total estate, or the remainder (residue) after other beneficiaries are paid.

Having an up-to-date Will is the only way to ensure your wishes are honoured. Without one, your estate is distributed according to a legal formula which may not reflect your values or support the people and causes you care about most.

Types of Bequests

There are four ways in which a bequest can be made:

Residuary: A percentage or the remainder of the estate after debts, expenses, and specific gifts to loved ones are fulfilled.

Percentage: A set percentage of the total estate.

Pecuniary/Specific: A fixed sum of money or specific assets like property, shares, or artwork.

Contingent: A gift that only takes effect if other beneficiaries pass away first.

Please bear in mind when drafting your will that unrestricted bequests give the Society the flexibility to direct your support where it is needed most

Suggested Wording for Bequests

When you make a gift in your will, we recommend seeking independent professional advice from a financial advisor or solicitor. Here we offer suggested wording for different forms of testamentary gifts that you can discuss with your solicitor.

To give a cash bequest to the Royal Western Australian Historical Society:

I give, free of all duties and taxes, the sum of \$ to the Royal Western Australian Historical Society Inc. (ABN: 43 607 110 473), trading as 'History West', of 109 Stirling Highway, Nedlands, 6009. My gift is for the use and benefit of the Society at its absolute discretion. The receipt of the President or authorised officer shall be an absolute discharge to my executors.

To give a specified percentage/residuary estate to the Royal Western Australian Historical Society after you have given specific bequests to others:

I give, free of all duties and taxes, the sum of \$ to the Royal Western Australian Historical Society Inc. (ABN: 43 607 110 473), trading as 'History West', of 109 Stirling Highway, Nedlands, 6009. My gift is for the use and benefit of the Society at its absolute discretion. The receipt of the President or authorised officer shall be an absolute discharge to my executors.

Options:

- The whole, or a specified per cent, of my estate
- A specified per cent of capital or income arising from [insert name] charitable trust
- Details of particular asset (for example, shares).

To leave an item, multiple items or significant collection material to Royal Western Australian Historical Society:

Please note offers of material will be assessed by our museum curators according to the principles outlined in our Collections Strategy. This ensures we do not duplicate material already held, and that we have the capacity to care for any new material we accept. We would be pleased to offer advice for the appropriate placement of items you wish to bequest that we are unable to accept.

I give, free of all duties, and transfer of any copyright [specified item] to the Royal Western Australian Historical Society Inc. (ABN: 43 607 110 473), trading as 'History West', of 109 Stirling Highway, Nedlands, 6009. My gift is for the use and benefit of the Society at its absolute discretion. The receipt of the President or authorised officer shall be an absolute discharge to my executors.

To make a bequest to the Royal Western Australian Historical Society for a specific purpose or activity:

I give, free of all duties and taxes, the sum of \$ to the Royal Western Australian Historical Society Inc. (ABN: 43 607 110 473), trading as 'History West', of 109 Stirling Highway, Nedlands, 6009. My gift is for [acquisition of / the use and benefit of] the Society. The receipt of the President or authorised officer shall be an absolute discharge to my executors.