



Life Eternal Trust (Australia)

The administrative body for Sahaja Yoga Meditation in Australia

10 Clarence Street Burwood NSW 2134 Australia

www.leta.org.au • ABN 99 071 308 371



Guidance for Sahaja Yogis wishing to leave a Bequest under their Will to Life Eternal Trust (Australia)

22nd September 2018

1. Introduction

Thank you for your interest in considering leaving a gift in your Will to Life Eternal Trust (Australia) - LETA. LETA is a registered Australian charity that has been established to advance the Sahaja Religion within Australia.

This document provides guidance to Sahaja Yogis who are a potential donor wishing to leave a bequest to LETA.

We have set out below (in Section 2) an extract of the Trust's purposes under clause 4.1 of the Trust Deed establishing LETA. Any gifts to LETA will be solely used to further these trust purposes. Please let us know if you would also like us to provide you with a copy of the Trust Deed, which may also be accessed at any time via the Australia Charities and Not-for-Profits Commission (ACNC) Register at www.acnc.gov.au.

If you choose to leave a gift in your Will to LETA, we hope you will let us know so that we may thank you. We also encourage you to speak with your family members about your wishes and to ensure that you have adequately provided for any of your dependents under your will.

2. Extracts from Trust Deed of Life Eternal Trust (Australia)

Below is an extract from LETA's Trust Deed about its purpose:

Clause 4.1 Trust Purpose

The purposes for which the Trust is established are:

- (a) *the advancement of the Sahaja Religion by:*
 - (i) *promoting and propagating the understanding and practices and the maintenance of the spiritual teachings of the Sahaja Religion as taught by Her Holiness by providing and facilitating lecture courses, public meetings, study groups, seminars, Sahaja Yoga or any other means as determined by the President and the Trustee from time to time; and*
 - (ii) *establishing and maintaining such centres, including meeting places, places of worship, libraries, ashrams, retreats, hospitals, medical and agricultural research centres and schools as determined by the President and the Trustee from time to time; and*
- (b) *to do such other things as are incidental or conducive to the attainment of these purposes, including establishing a public fund.*

3. Guidance when preparing a Will

Yogis should be mindful of the following information when preparing their Will to leave a bequest to LETA :

- It is strongly recommended that donors obtain legal advice from persons with relevant expertise in preparing their Wills, as poorly drafted wills can lead to costly disputes and court proceedings to remedy any deficiencies in the drafting, and also lead to unintended consequences due to the nuances in charity law.
- It is important that donors discuss their wishes with their families and loved ones and ensure that they make appropriate provision for their dependents in their Will. This can reduce the risk that a family member or dependent will bring a family provision claim to challenge their Will on the basis that adequate provision was not made for them under the Will.
- If a bequest is to be left to Life Eternal Trust (Australia), it is important to ensure that the trust is correctly named and identified in the will (using its full name and ABN), which is “**Life Eternal Trust (Australia) ABN 99 071 308 371**”
- Any bequest to Life Eternal Trust (Australia) should not have conditions that may make it impossible or impracticable for the Trustees to accept the gift subject to those conditions. In such a case, if the Trustees may have no choice but to decline to accept the bequest or may be required to expend funds to apply to court to vary the terms of the bequest.
- If a donor has a particular interest or wish, it is preferable that the donor leaves a bequest to Life Eternal Trust (Australia) for its general charitable purposes, but with an express non-binding preference or wish that the bequest be used in a particular manner. This express wish or preference may be set out in the Will itself, or in a separate letter accompanying the Will. This will enable the trustees to decide from time to time how best to apply the bequest in furtherance of the Trust’s purposes, as needs arise and change over time, but will also enable the Trustees to understand and take into account the express wishes of the donor.

4. Sample wording for Wills

There are many different forms of wording that may be used in a Will to leave a bequest to Life Eternal Trust (Australia). We offer the below wording as options for potential donors to consider, together with their legal advisor, in preparing their Will.

(a) Option 1 – Specific gifts to Trust

I give [(\$insert sum) or (a percentage) or (the residue of my estate free from all duties and charges) or (the whole of my estate free from all duties and charges)] to the trust known as the Life Eternal Trust (Australia) (ABN 99 071 308 371), being a charitable trust established by deed of trust made 21 November 1986 for its general charitable purposes.”

I declare that a receipt of an officer of the trust at the time shall be sufficient to discharge my executor’s duty.

(b) Option 2 – Assets to be converted to cash and then given to Trust

I give the [(whole of my estate) or (rest and residue of my estate)] both real and personal free from all duties and charges to the trustees of my estate on trust to convert my assets to cash and give the balance to Life Eternal Trust (Australia) (ABN 99 071 308 371), being a charitable trust established by deed of trust made 21 November 1986 for its general charitable purposes.

I declare that a receipt of an officer of the trust at the time shall be sufficient to discharge my executor’s duty.

5. Further information

- If you have any questions or if we can be of further assistance, please do not hesitate to contact us at will-bequests@leta.org.au
- LETA's entry at the Australia Charities and Not-for-Profits Commission (ACNC) Register www.acnc.gov.au
- Life Eternal Trust Australia's website: www.leta.org.au

Thank you again for your interest in supporting Life Eternal Trust (Australia).

We hope you will give consideration to leaving a gift in your Will to this Trust, confident in the knowledge that in so doing, you will be making a wonderful contribution to the advancement of HH Shri Mataji Nirmala Devi's work through Sahaja Yoga.

Jai Shri Mataji!

Yours Sincerely,

Craig Armstrong, Hari Gaikwad, Chris Kyriacou
LEPA Directors acting as Corporate Trustee of Life Eternal Trust Australia