



## **ATEC – Future Skills Legacy Fund**

### **Online Bequest Intention Form (Draft)**

*Confidential*

Thank you for considering a bequest to ATEC through the Future Skills Legacy Fund (FSLF). Completing this form helps ATEC understand your intentions and plan for future support. This is **not a legally binding document** and does not replace your will. All information provided will be treated in the strictest confidence.

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#### **1. Personal Details**

**Full Name:**

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**Date of Birth:**

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**Address:**

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**Phone:** \_\_\_\_\_

**Email:** \_\_\_\_\_

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#### **2. Bequest Details**

Please select the type of bequest you intend to leave to ATEC:

- Residual Bequest** (a percentage of your estate after other gifts and costs are settled)
- Specific Amount** (a fixed dollar amount)
- Specific Asset** (property, shares, etc.)
- Percentage of Estate**
- Other** (please describe):

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**Estimated Value (optional):**

### 3. Bequest Purpose

Please indicate how you would like your bequest to be used:

**Unrestricted Bequest**

*(Allows ATEC to allocate funds to areas of greatest need.)*

**Restricted Bequest**

*(Please specify the area you wish to support. ATEC may discuss your wishes to ensure alignment with organisational needs.)*

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### 4. Recognition Preferences

ATEC would like to acknowledge your generosity. Please indicate your preference:

**I am comfortable being acknowledged publicly** (e.g., in annual reports or recognition listings).

**I prefer my bequest to remain anonymous.**

If public recognition is permitted, please indicate how you would like your name to appear:

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### 5. Executor/Legal Representative (Optional)

**Name:** \_\_\_\_\_

**Organisation (if applicable):** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Email:** \_\_\_\_\_

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## 6. Confirmation

I understand that this form is an expression of my current intentions only and is **not legally binding** on me or my estate. I acknowledge that ATEC may contact me to discuss my bequest to ensure my wishes can be appropriately honoured.

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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## 7. Return Details

If you wish to discuss your donation further please contact ATEC HR via [humanresources@atec.asn.au](mailto:humanresources@atec.asn.au)