SHAKE IT UP: BEQUEST INFORMATION PACK

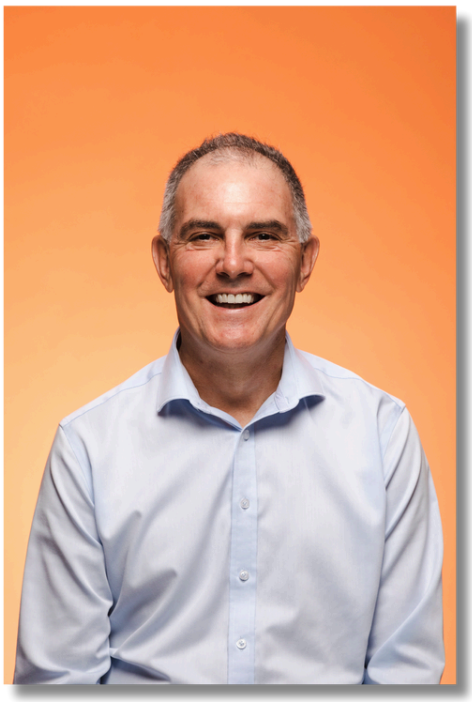
Be remembered for shining a light on life-changing research.

SHAKE IT UP
AUSTRALIA FOUNDATION

LEAVING A GIFT IN YOUR WILL TO SHAKE IT UP

We can't all be brain scientists, but we can all get involved.

Michael J. Fox



So far, Shake It Up has funded 85 research projects at 24 research institutes to the value of $36.4 million.

Clyde Campbell AM, Founder of Shake It Up

SHAKE IT UP AUSTRALIA FOUNDATION: ABOUT US

Shake It Up Australia Foundation is a not-for-profit organisation established to promote and fund Parkinson's disease research in Australia. Our mission is to accelerate innovative research and treatments to slow, stop, and cure Parkinson's.

Thanks to our founding directors covering all overhead and administration costs, **100% of every donation, including bequests, goes directly to research**. Your legacy will help fund world-class, innovative research that brings us closer to a future without Parkinson's.

Leaving a gift to Parkinson's research is a lasting and meaningful way to advance treatments and a cure for Parkinson's. Not only will your gift help the 200,000 Australian's living with Parkinson's, it will also leave a lasting legacy for future generations.

WAYS TO LEAVE A GIFT

Once you have remembered those closest to you, there are several ways to support the Shake It Up Australia Foundation by including a gift in your will.

	RESIDUAL BEQUEST Leave the remainder (or a percentage of the remainder) of your estate once specific gifts and expenses have been allocated
	PERCENTAGE BEQUEST Nominate a percentage of your total estate.
	SPECIFIC BEQUEST You can make a specific bequest by simply stating the dollar amount in your Will that you wish to leave.
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It's important to talk to your loved ones about your intentions and let them know that leaving a gift to Parkinson's research is important to you. This can help to ensure that your intentions and wishes are carried out.

DIRECTING YOUR GIFT

Including a gift in your will is a deeply personal choice, and we'd be honoured to talk with you about how we can best respect and support your wishes.

You may choose to:

- Support the Area of Greatest Need Your gift will be directed to the most urgent and promising research projects at the time.
- Support a Specific Area of Research If you have a particular interest, such as early diagnosis, disease-modifying therapies, or clinical trials, we can work with you to ensure your gift aligns with your wishes.

WRITE YOUR WILL FOR FREE ONLINE

Shake It Up Australia Foundation has partnered with Gathered Here, Australia's leading online will-writing platform, to offer you a free, legally valid will in under 10 minutes.

You can include a bequest to Shake It Up Australia Foundation as part of this simple process.

Start your free will here: https://wills.gatheredhere.com.au/c/shake-it-up

Cures don't just fall from the sky. We have to go up and get them.

Michael J. Fox

SUGGESTED WORDING FOR YOUR WILL

For peace of mind when writing or updating your will, it's a good idea to speak with a solicitor, trustee, or accredited estate planning professional.

To ensure your wishes are legally valid and clearly understood, we recommend the following wording:

FOR A RESIDUAL BEQUEST:

"I give and bequeath to Shake It Up Australia Foundation (ABN 65 270 391 304), the residue [or a specified percentage] of my estate to be applied for its general purposes [or specify a particular area of research]. I declare that the receipt of an authorised officer of the Shake It Up Australia Foundation shall be a full and sufficient discharge to my Executor."

FOR A SPECIFIC OR PROPERTY BEQUEST:

"I give and bequeath to Shake It Up Australia Foundation (ABN 65 270 391 304), the sum of $[amount] [or describe the specific asset], to be applied for its general purposes [or specify a particular area of research]. I declare that the receipt of an authorised officer of the Shake It Up Australia Foundation shall be a full and sufficient discharge to my Executor."

DONOR RECOGNITION AND STEWARDSHIP

At Shake It Up Australia Foundation, we are deeply grateful to those who choose to leave a gift in their will. Your legacy is a powerful commitment to a future free from Parkinson's disease, and we are honoured to recognise and celebrate your generosity.

THE PARKINSON'S LEGACY LEAGUE

All individuals who notify us of their intention to leave a bequest are invited to join the Shake It Up Australia Foundation Legacy League - a special community of supporters who share a vision for lasting impact.

As a member of the Legacy League, you will receive:

- Personalised updates on the progress and impact of Parkinson's research funded by the Foundation
- Invitations to exclusive events, including research briefings and donor gatherings
- Recognition in our publications and website (with your permission)
- A certificate of appreciation acknowledging your commitment to our mission

HONOURING YOUR LEGACY

We understand that a bequest is a deeply personal decision. Whether you wish to remain anonymous or be publicly acknowledged, we will respect your preferences and ensure your legacy is honoured in accordance with your wishes.

STAYING CONNECTED WITH YOUR LOVED ONES

We encourage all pledged bequestors to nominate a next of kin or chosen family member for us to stay in contact with once your gift is realised. This allows us to:

- Express our gratitude to your loved ones
- Share the impact of your legacy
- Honour your memory in a way that reflects your values

FREQUENTLY ASKED QUESTIONS

1

DO I NEED TO REWRITE MY ENTIRE WILL TO INCLUDE A BEQUEST?

Not necessarily. You can add a bequest by creating a legal amendment to your will. However, we recommend consulting a solicitor or using a trusted online platform like Gathered Here.

2

CAN I CHOOSE HOW MY GIFT IS USED?

Yes. You can direct your gift to a specific area of research or allow us to allocate it where it's needed most.

3

IS THERE A MINIMUM AMOUNT I NEED TO LEAVE?

No. Every gift, no matter the size, makes a meaningful difference.

4

IS MY BEQUEST TAX-DEDUCTIBLE?

Bequests are not subject to income tax or capital gains tax for the donor or their estate in Australia.

5

SHOULD I NOTIFY SHAKE IT UP IF I'VE INCLUDED A BEQUEST?

You're under no obligation to tell us, but we'd love the opportunity to thank you and keep you informed about the impact your future gift will make.

6

CAN I FORMALLY DOCUMENT MY BEQUEST INTENTIONS WITH SHAKE IT UP AUSTRALIA FOUNDATION?

Yes. While notifying us of your bequest is entirely optional, we encourage supporters to consider completing a Gift Agreement (Bequest Plan). This non-binding document allows you
to formally record your intention to leave a gift in your will and outline any preferences you may have regarding how your gift is used or recognised.

Completing a Bequest Plan helps us:

- Understand your wishes and ensure they are honoured
- Keep you informed and engaged through our Legacy League
- Plan more effectively for future research investments

It also gives you the opportunity to nominate a next of kin or chosen family member for us to stay in contact with once your gift is realised, so we can express our gratitude and share the impact of your legacy.

If you're interested in completing a Gift Agreement, please contact us — we'd be happy to guide you through the process.

CONTACT US

If you're considering leaving a gift in your will to Shake It Up Australia Foundation, we'd be delighted to speak with you. Whether you'd prefer to connect in person, over the phone, or via video call, we're happy to arrange a time that suits you.

Renee Burton | Philanthropy Manager
Shake It Up Australia Foundation

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