

The Brandenburg Bequest Program

The Australian Brandenburg Orchestra is the country's finest baroque orchestra. Our mission is to enthuse audiences by presenting the highest quality baroque and early classical music, interpreted through period instruments, retaining the freshness and vitality of an original as if heard for the first time. To do this every year, the Brandenburg relies on the support of businesses, governments and individuals, just like you.

The Brandenburg performs before a live audience in excess of 40,000 people annually in Sydney and Melbourne, and hundreds of thousands more through national radio broadcasts on ABC Classical FM. It also tours nationally and has a regular commitment to performing in regional Australia. Since 2003, the Brandenburg has been a member of the Major Performing Arts Group. It has won five ARIA Awards for Best Classical Recording in 1998, 2001, 2005, 2009 and 2010.

There are many ways to help the Brandenburg but one of the most valuable ways is by leaving a bequest to the Brandenburg in your Will.

A Will is a legal document which allows you to determine how and to whom your estate and belongings will be distributed. By having a Will, you will ensure that the people and the things which are important to you continue to be supported after your lifetime. Being an important document, you should seek good legal advice on the preparation of your Will.

If the Brandenburg is important to you and enriched your life in any way, you may decide to leave a bequest to the Brandenburg in your Will. By doing so, you will ensure that the Brandenburg can continue to be the country's finest baroque orchestra and enrich its future audiences with the highest quality baroque and early classical music for many years to come.

1. Ways to include a bequest to the Brandenburg in your Will

A bequest to the Brandenburg in your Will can take several forms:

- A specific bequest. You can bequest to the Brandenburg a specified dollar amount large or small, or a specified asset such as shares or real estate.
- A percentage bequest. You can bequest to the Brandenburg a nominated percentage of your estate up to 100%.
- A residual bequest. You can bequest to the Brandenburg the balance of the value of your estate after those specifically named in your Will have been provided for and all debts and expenses of the estate have been paid.
- An alternative or contingent bequest. You can make a bequest to the Brandenburg where the Brandenburg will only become a beneficiary in the unlikely event that the other recipients named in your Will do not survive you.

It is important that all bequests to the Brandenburg are made using our full legal name, Brandenburg Ensemble Limited ABN 41 003 908 183.

Alternatively, you may wish to make a bequest to the Brandenburg Foundation. The Brandenburg Foundation was established to provide support and stability for the long term artistic future of the Brandenburg Orchestra. If you would like to make a bequest to the Brandenburg Foundation, please use the foundation's full legal name, Brandenburg Foundation. The Brandenburg Foundation is operated by Brandenburg Foundation Limited ABN 79 122 406 099, which is a separate entity and has its own Board of Directors.

Please contact us if you would like a copy of our preferred legal wording to include the Brandenburg in your Will.

Thank you very much for this special support for the Brandenburg.

2. Notifying the Brandenburg of your bequest

We would be grateful if you notified us if you decide to include the Brandenburg in your Will. It will give us the opportunity to record your support and thank you personally and assist us in planning for the Brandenburg's future.

3. Code of Conduct

The Brandenburg's Bequest Program is guided by a code of conduct. This code of conduct was developed to reflect the Brandenburg's commitment to high standards of behaviour in the Brandenburg's dealings with Donors.

- the Brandenburg is committed to the highest standards of behaviour and professionalism. the Brandenburg will conduct itself and in all dealings with Donors and potential Donors based on the values of respect, honesty, integrity and transparency.
- the Brandenburg respects Donor's freedom of choice. Every effort will be made to honour a Donor's requests to the Brandenburg in relation to the Brandenburg's bequest program.
- the Brandenburg will recommend to all Donors that they seek independent qualified advice from a lawyer, accountant or tax advisor before gifting to the Brandenburg any property or making a bequest in his or her Will. In particular, the Brandenburg will encourage Donors to seek independent advice if the Brandenburg has any reason to believe that the proposed gift might significantly affect the Donor's financial position or relationship with other family members.
- the Brandenburg respects the privacy of its Donors and will keep confidential all personal information collected from a Donor.
- the Brandenburg shall respond promptly to a complaint by a Donor or a potential Donor about any matter addressed in this Code of Conduct in a timely, respectful and open manner.
- All gifts and bequests to the Brandenburg will be used to support the Brandenburg's stated mission and purposes. To the extent any gift or bequest has been made for a specific purpose only, the gift or bequest shall be used for that purpose only unless the Brandenburg has received written authorisation from the donor or the donor's legal representative.

- Gifts of assets such as shares or real estate will be accepted by the Brandenburg. The Brandenburg will realise those assets after transfer to the Brandenburg and the proceeds will be used to further the Brandenburg's stated mission and purposes.
- All decisions in relation to the investment of bequest funds are under the control and management of the Brandenburg's Board of Directors, except where an independent trustee has been nominated.

Suggested wording

- ***If a specific, percentage or residual bequest***

I _____, give to the Brandenburg Ensemble Limited (ABN 41 003 908 183)
142 New South Head Road Edgecliff, in the state of New South Wales

- [the rest and residue of my estate]
- [the sum of _____dollars]
- [____% of my estate]
- [specific property and details of property]

free from all duties to be used for the general purposes of Brandenburg Ensemble Limited and I DECLARE that the receipt of the Director, Company Secretary or other authorised officer of Brandenburg Ensemble Limited for the time shall be an absolute discharge to my executor for my bequest.

- ***If an alternative or contingent bequest***

If any of my nominated beneficiaries predecease me, the bequest shall not fail but I give the share of my deceased beneficiary to Brandenburg Ensemble Limited (ABN 41 003 908 183).

- ***If a bequest to the Brandenburg Foundation (the Brandenburg Foundation was established to provide support and stability for the long term artistic future of the Brandenburg Orchestra)***

I _____, give to the Brandenburg Foundation, of the Brandenburg Foundation Limited ABN 79 122 406 099 142 New South Head Road Edgecliff, in the state of New South Wales

- [the rest and residue of my estate]
- [the sum of _____dollars]
- [____% of my estate]
- [specific property and details of property]

free from all duties to be used for the general purposes of the Brandenburg Foundation and I DECLARE that the receipt of the Director, Company Secretary or other authorised officer of the Brandenburg Foundation Limited for the time shall be an absolute discharge to my executor for my bequest.