



Quiz

Charitable Gifts in the Will-Making and Estate Administration Process

1. Which of the following is a means for someone to give to a charity during their lifetime?
 - a. A direct donation to the charity
 - b. A private ancillary fund
 - c. Setting aside a portion of their superannuation fund to be donated to charity
 - d. Both A and B

2. Which of the following is *not* one of the critical mistakes made by solicitors when drafting a will for a client?
 - a. Lack of full understanding of how a will should be structured
 - b. Misdescribing the organisation or charity the gift is intended to be left to
 - c. Not following the client's instructions concerning charitable gifts
 - d. Directing the charity to use the gift in a particular way

3. What should solicitors do when drafting a will to ensure the correct bequeathing of a charitable gift?
 - a. Ensure that the name of the charity that will be named in the will as the recipient of the gift is the name that the charity uses
 - b. Conduct an ABN search to determine whether the charity has tax-deductible status
 - c. Word any particular purpose the client wants the gift to be put towards as an expression of wish
 - d. All of the above

4. What should an executor *not* do in the estate administration process regarding a charity expressed to receive a gift under a client's will?
- a. Notify the charity following the client's death that they will be receiving a gift under the client's will
 - b. Do not provide a copy of the client's will to the charity, as this is considered a confidential document
 - c. Keep the charity continually apprised of the progress of the administration
 - d. Provide the charity with accounts
5. What does it mean for a charity named as a recipient of a gift in a client's will to have DGR status?
- a. There will be no tax implications with the passing of the gift to the charity
 - b. The charity will be liable for capital gains tax with the passing of the gift to the charity
 - c. They are not a registered charity and as such are unable to be named as the recipient of a gift under a will
 - d. None of the above

Answers:

1. D 2. C 3. D 4. B 5. D