


YOUR WILL
IS THEIR WAY



ALEXANDER
MORRISON
CIRCLE





Generations of Scotch boys have benefited from the generosity of men and women who, over the years, have bequeathed gifts to the School or to the Scotch College Foundation.

These gifts have had a profound impact on the lives of Scotch boys, through scholarship opportunities, by developing teaching and learning facilities, and by supporting staff and the School's programs.

A gift in a Will can be a way of saying thank you, honouring a loved and respected relative, recognising a valued member of staff or friend, investing in the future, or providing a Scotch education for those who otherwise cannot afford it.

YOUR WILL IS THEIR WAY.



OUR SCHOOL



“WE BELIEVE IN ESTABLISHING SOUND FOUNDATIONS WHILST LIGHTING THE FIRES FOR FUTURE GROWTH.”

I TOM BATTY, PRINCIPAL

From Scotch's earliest days in the heady atmosphere of the gold rush of the 1850s, its leaders have had the foresight and wisdom to plot the best course to stimulate boys' minds and bodies.

Strong traditions breed values of integrity, compassion and service, while educational research delivers an innovative curriculum promoting curiosity and self-worth. Embracing the inherent value of each person, boys ponder how the world came to be as it is, and how it might be made to evolve for the greater good.

We are fortunate to have extensive grounds, exceptional facilities and staff members of real commitment who, in building relationships of trust

and intimacy, create the space for our boys to question, initiate and lead.

A bequest to Scotch is an investment in the School's future, and an effective means to ensure the School will continue to offer a distinctive education that prepares boys for the challenges of their generation.

I strongly encourage you to consider making a bequest to Scotch and look forward to welcoming you as a member of the Alexander Morrison Circle.

**I TOM BATTY,
PRINCIPAL**

PERPETUATING
THE VISION



The School's Scottish heritage is reflected in many aspects of Scotch's life, from its Christian faith, its belief in a broadly-based liberal curriculum in the arts, sciences and humanities, and in a culture forged in the tradition of Scottish egalitarianism.

Scotch College is a product of the Enlightenment which swept through Scotland in the 18th Century. Our founder, the Reverend James Forbes, campaigned strongly for a system of public education to be established in the colony of Victoria. He worked tirelessly to establish Scotch College, which opened its doors on 6 October 1851.

Forbes was passionate about the importance of education to the future of Australia, and espoused the notion that each generation should be better than the one before. Scotch has always sought to live up to Forbes' belief in the necessity for a broad, general and scientific education based on Christian principles.

The Scotch College of today is a modern and dynamic Australian school, inspired by the values of our founder, and based firmly on the crucial role we believe education plays in empowering young people to take control of their lives.

The Scotch College Foundation is committed to perpetuating this vision, ensuring Scotch will be everything it can be for each boy.

The buildings and facilities, and the site itself, from which generations of boys have enjoyed and benefited, are almost entirely the direct result of the generosity of Scotch families and Old Boys who have gone before. Philanthropy has also opened the gates to a Scotch education for many boys who would not otherwise be able to attend the School.

SCOTCH WOULD BE NOTHING LIKE IT IS TODAY WITHOUT
THE PHILANTHROPIC SUPPORT OF ITS COMMUNITY.





“EDUCATION MUST BE REGARDED AS THE GREAT
REMEDY FOR THE ILLS OF THE BODY POLITIC, THE BASIS
ON WHICH MUST BE MAINLY RESTED ALL HOPES OF
ITS AMELIORATION, AND OF ITS FUTURE GENERATIONS
BEING BETTER THAN THE PRESENT.”

THE REVEREND JAMES FORBES
FOUNDER, SCOTCH COLLEGE



THEIR WILL ... THEIR IMPACT



BEQUESTS OF EVERY SIZE
HAVE HELPED SHAPE SCOTCH.



JOHN MITCHELL BELLAIR

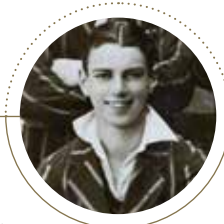
Born 22 May 1909, SC 1920-27, died 27 May 2001. John was the son of Old Boy John Berry Bellair (SC 1897-1900).

John was a 1926 Prefect and 1927 School Captain. He was an agricultural scientist, expert horseman, steeplechaser, drover, farmer, grazier, shire councillor, sailor, Francophile, mountain climber and writer. John served in the AIF (1939-45) in the Greek and New Guinea campaigns, becoming a captain, and personal assistant to Lieutenant-General Sir Leslie Morshead. John left the major part of his estate to the Scotch College Foundation to establish the **John Bellair Scholarship Fund**. The bequest totalled \$1.6M in 2001 and had grown to over \$3M by 2017. Since its establishment 50 boys have been awarded scholarships from this fund who would not otherwise have been able to attend Scotch.

COLIN HENRY KEON-COHEN CMG OBE

Born 23 March 1907, SC 1916-25, died 16 January 1982.

Colin competed in the 1921 Athletics team, and the 1924 and 1925 1st XI. He was a 1924 Probationer, 1925 Vice-Captain of Monash House, and a 1925 Prefect. A solicitor, he served in the RAF (1941-42) and RAAF (1942-45). Colin's post-war passion was helping ex-servicemen, culminating in being an RSL national vice-president (1974-79) and Victorian RSL president (1975-79). He had an enduring interest in Scotch and the Old Scotch Collegians' Association. Colin left his entire estate of over \$450,000 to the **Scotch College Foundation Endowment Fund (Corpus)**, income from which is paid to the School annually for its general purposes. This bequest is the major contribution to the Endowment Fund (Corpus) which had grown to \$11M by 2017. The original Senior School gym, which is now the Senior School Dining Hall, is named in his honour.



MABEL MCBETH (BETH) BREWSTER AND JOHN DAVID (DAVID) POWELL

Beth (died 8 January 2015) was the long-term partner of David (born 25 August 1928, SC 1935-45, died 29 July 2007).

David's father, Harry Fowler Powell, was a permanently incapacitated World War I soldier who died when David was 16. David was eternally grateful to the RSL, and to Scotch, for their generosity in enabling him to attend Scotch. Beth left a third of her estate (over \$1.1m) to establish the **Beth Brewster Boarding Scholarship**, and a Sir Zelman Cowen Centre for Science laboratory in David's memory. Both were members of the Alexander Morrison Circle.



WALTER JOHN PATON

Born 29 November 1914, SC 1926-32, died 28 May 2015.

Walter was a music teacher who joined the army in 1941. He served in New Guinea from 1943, joining the AIF (1944-46). Walter was a group 1 instrument mechanic. He returned to Australia in 1944, spending the remainder of the war in Brisbane, and was demobilised as a lance corporal. Walter worked as a salesman and a newsagent. A canny investor, he bequeathed his large estate to numerous charities, with the Scotch College Foundation receiving over \$6m to establish the **Walter J Paton Music Scholarship**.



LIONEL RICHARD VIVIAN SPENCER

Born 25 April 1896, SC 1908-15, died 12 March 1988.

Lionel was a member of the Athletics team (1911-13 and 1915), the premierships 1913 1st XVIII and the 1914 and 1915 1st XVIII's. Lionel was an AIF gunner (1917-18) and a second lieutenant in the AFC (1918-20). He took over Spencer Motors and brought the Volkswagen to Australia. Over \$8m has been received from his estate to support the **Scotch College Building Fund**, including the **Spencer Centre for Design and Technology**, which was opened in February 2018 and named in Lionel's honour.

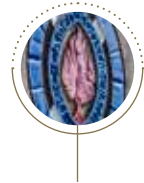


WILLIAM SLOAN TINGATE

Born 10 July 1937, SC 1951-55, died 20 February 2016.

William was a 1955 Probationer and 1st VIII member. A member of Scotch's notable Sloan rowing family, Bill became active in OSCA activities as a player, supporter, secretary and Vice President of the Old Scotch Football Club. Bill was involved in the Old Scotch Athletics Club, the Bushwalking Club, the Lodge, Koomerang, the Cardinal Club and the Heritage Club. Until the end he remained a passionate and practical supporter of Scotch, and of OSCA, of which he was 1990 President. He left \$5,000 in his Will to the **Scotch College Foundation Endowment Fund (Corpus)**.

YOUR WILL ...
THEIR WAY



SO MUCH AT SCOTCH HAS BEEN ACHIEVED THROUGH
THE GENEROSITY OF THE SCOTCH FAMILY.

You can choose to make a gift now, in your Will, or to do both. You can direct your gift according to your wishes.

Depending on the impact you wish to make, you can support Scotch through a gift in your Will to:

- The Scotch College Foundation Scholarship Fund (for Academic, Music, Boarding or Indigenous Scholarships), allowing boys who otherwise would not be able to attend Scotch to do so
- The Scotch College Foundation Scholarship Fund to establish an individually named separate perpetual scholarship fund
- The Scotch College Building Fund (for building purposes)
- The Scotch College Archive/Museum Fund (protecting, preserving and displaying Scotch's rich history)
- The Scotch College Foundation Endowment Fund (Corpus) (a gift in perpetuity)
- Scotch College for general purposes, and your gift will be directed to the area most in need.

EVERY GIFT OF EVERY SIZE WILL HAVE A LASTING IMPACT
ON THE SCHOOL AND ALL WHO ARE FORTUNATE ENOUGH
TO WEAR THE CARDINAL, GOLD AND BLUE.

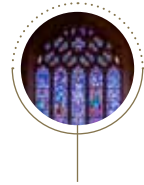


“THERE CAN BE NO GREATER GIFT
THAN THE GIFT OF EDUCATION.”

“By including Scotch in your Will,
you help to ensure that future
generations of boys will continue
to acquire an enduring love
of learning, and benefit from a
life-changing educational experience,
where each boy is presented with
the opportunity for success.”

MICHAEL ROBINSON AO ('55)
SCOTCH COLLEGE FOUNDATION PRESIDENT,
1993-96 AND 2008-17
AMC MEMBER

RECOGNISING YOUR GIFT:
THE ALEXANDER MORRISON CIRCLE



“SOMEONE IS SITTING IN THE SHADE TODAY BECAUSE
SOMEONE PLANTED A TREE A LONG TIME AGO.”

WARREN BUFFETT, PHILANTHROPIST

The Alexander Morrison Circle (AMC) provides a means for Scotch to thank and honour those who have provided for future generations through a gift in their Will.

The AMC was inaugurated in 2003 and is named in honour of Alexander Morrison, who was Principal from 1857 to 1903 (the School's second Principal). Morrison was instrumental in building Scotch into the leading educational institution it is today.

Each bequest, no matter what its size, contributes to the School's future.

Members maintain a close connection with Scotch through AMC functions and other special events, and have opportunity to develop relationships with Scotch alumni, staff and friends.

While we encourage all bequest donors to become members of the AMC, we also welcome and respect bequests made anonymously.



SCOTCH
BY THE
YEARS



FIRST SITE – 1851
155 Spring Street, Melbourne



SECOND SITE – 1851
61 Spring Street, (corner of Spring and Little Collins Streets, Melbourne)



THIRD SITE – 1854
Corner of Grey and Lansdowne Streets, East Melbourne



FOURTH AND PRESENT SITE – 1916
Hawthorn Glen



LITTLEJOHN MEMORIAL CHAPEL – 1936



ARTHUR ROBINSON HOUSE – 1938



LANGUAGE AND CULTURE CENTRE – 1995



LITHGOW CENTRE – 1998



JAMES FORBES ACADEMY – FINAL STAGE BUILT 2005



SIR ZELMAN COWEN CENTRE FOR SCIENCE – 2016

1851

1857

1904

1934

1953

1964

1975

1983

2008



JAMES FORBES

- Presbyterian Minister and founder of the Melbourne Academy later known as Scotch College



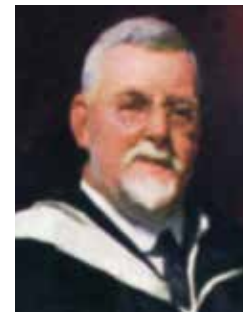
ROBERT LAWSON
PRINCIPAL 1851-56

- School first located at 155 Spring Street, later on the corner of Spring and Little Collins Streets



ALEXANDER MORRISON
PRINCIPAL 1857-1903

- Scotch moves to East Melbourne
- 1858 - First Public School cricket match - GGS v SC
- First Public School Australian Rules football match - MGS v SC
- 1868 - First Head of the River
- 1879 - Old Scotch Collegians' Society formed
- 1895 - Old Scotch Collegians' Club established



WILLIAM LITTLEJOHN
PRINCIPAL 1904-35

- 1911 - First Foundation Day Concert
- 1913 - Old Scotch Collegians' Association formed
- 1916 - First classes at Hawthorn
- 1920 - Sir John Monash lays foundation stone for the Memorial Hall
- 1921 - First OSCA clubs established
- 1925 - East Melbourne campus closed at year's end



COLIN GILRAY
PRINCIPAL 1934-53

- 1935 - Sir Arthur Robinson, first OSCA leader to chair School Council (1935-45)
- 1936 - Old Scotch Collegians' Club becomes the Public Schools' Club
- Littlejohn Memorial Chapel consecrated
- Monash Gates opened
- 1942-43 - Wesley College at Scotch



RICHARD SELBY SMITH
PRINCIPAL 1953-64

- 1953 - Endowment Fund established
- 1962 - First Building Appeal launched



COLIN HEALEY
PRINCIPAL 1964-75

- 1964 - Second Building Appeal
- 1970 - General Science Block opened
- 1971 - First edition of *Great Scot*
- 1972 - Scotch Association established
- 1973 - Scotch Foundation established



PHILIP ROFF
PRINCIPAL 1975-82

- 1976 - Maths and Science Building opened
- School Council Development Committee formed
- 1977 - OSCA office relocated to Scotch
- 1980 - Scotch incorporated under the Corporations Act with School Council membership selected by the Presbyterian Church, OSCA and Council itself



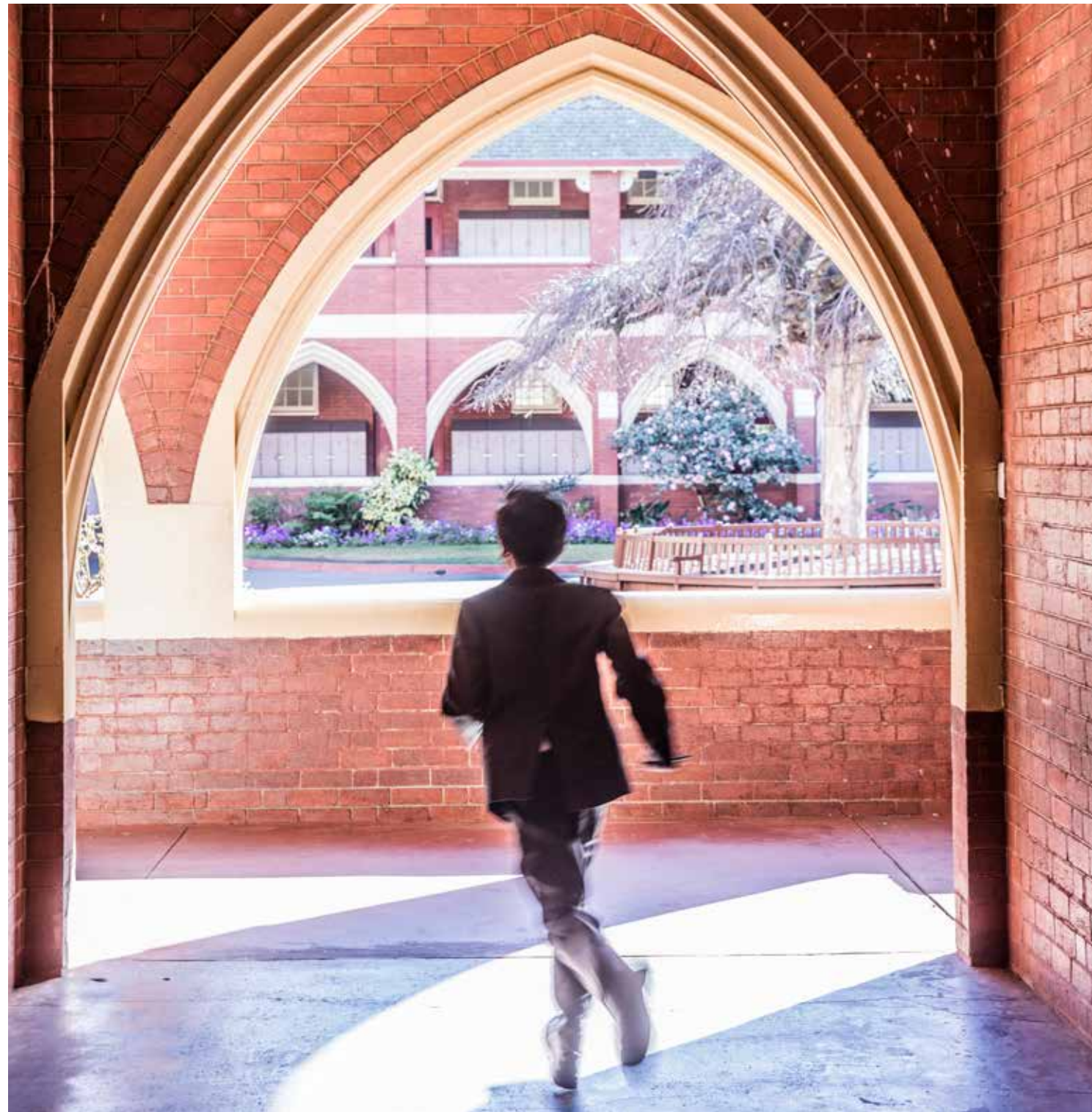
GORDON DONALDSON
PRINCIPAL 1983-2007

- 1987 - Master Plan for future development released
- 1993 - Lithgow Centre opened
- 1995 - Language Centre opened
- 2001 - Scotch celebrates its Sesquicentenary
- 2005 - James Forbes Academy opened



TOM BATTY
PRINCIPAL 2008-CURRENT

- 2011 - Reorganisation of the House system
- 2013 - Master Plan for future development released
- 2016 - Sir Zelman Cowen Centre for Science opened
- 2018 - Spencer Centre for Design and Technology opened



THE WILL TO GIVE



“I HAVE STRONG EMOTIONAL AND TANGIBLE LINKS
WITH SCOTCH – A SCHOOL WHICH HAS IN TURN NURTURED
MY GRANDFATHER, MY FATHER, MYSELF AND MY SON,
OVER A PERIOD OF MORE THAN 120 YEARS.”

DAVID ASHTON ('65), AMC MEMBER

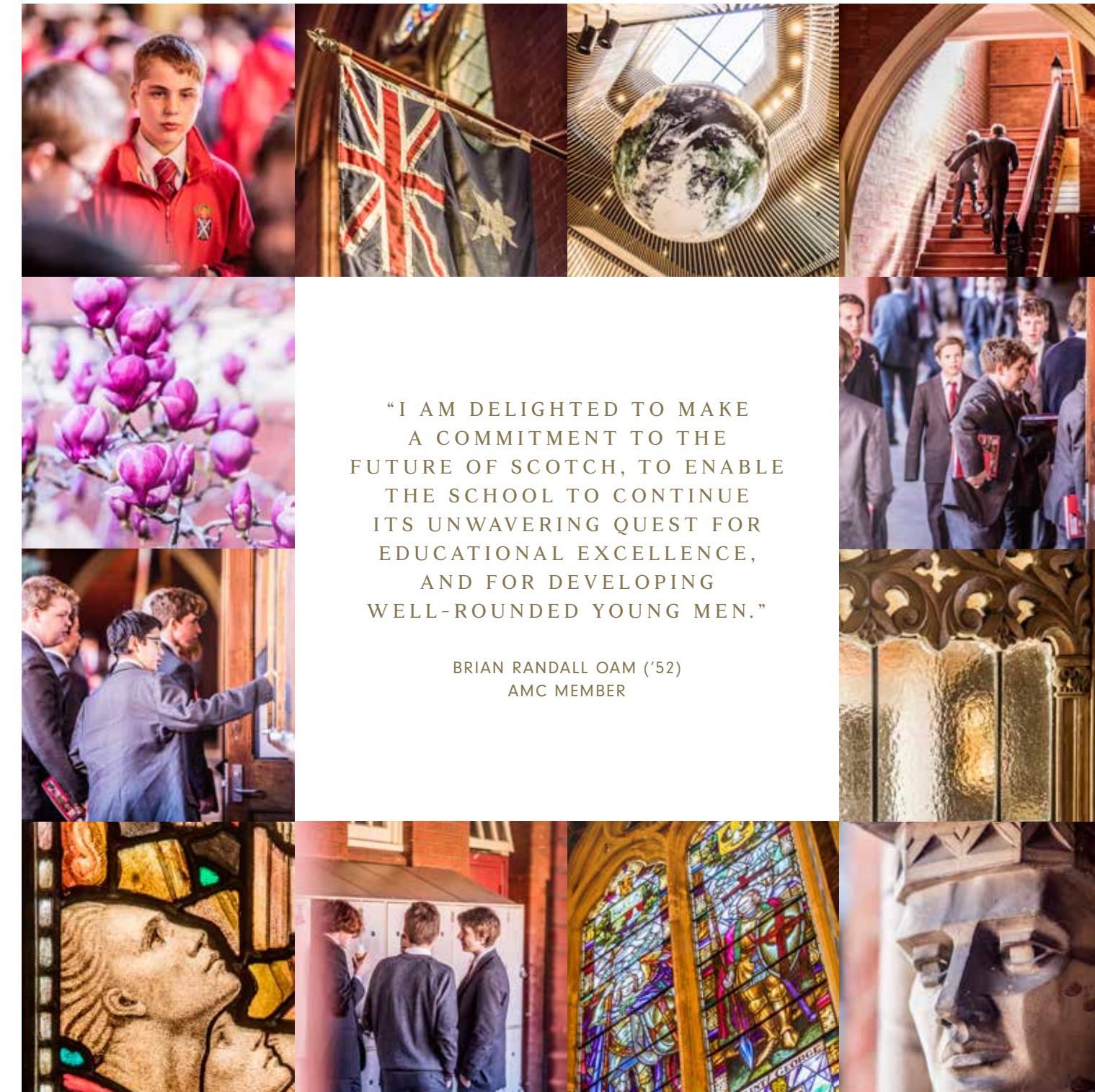
To ensure your gift has the impact you intend, you are most welcome to discuss your wishes and plans in confidence with our Bequest Program Manager.

Family comes first: when planning your estate we recommend you first discuss your intentions with your family, and also seek independent legal and financial advice.

The Scotch College Foundation is already the trustee of more than 25 individually named separate perpetual trust funds for scholarship purposes.

The Foundation's Board of Trustees comprises people with wide-ranging expertise and experience who carefully and conservatively manage all of its endowed funds, to maximise their return on a long-term basis.

The Board also has the benefit of external expert advice. This is performed without cost to the Foundation's endowed funds. Commercial entities often charge significant fees for their services which reduces the impact of your gift.



“I AM DELIGHTED TO MAKE
A COMMITMENT TO THE
FUTURE OF SCOTCH, TO ENABLE
THE SCHOOL TO CONTINUE
ITS UNWAVERING QUEST FOR
EDUCATIONAL EXCELLENCE,
AND FOR DEVELOPING
WELL-ROUNDED YOUNG MEN.”

BRIAN RANDALL OAM ('52)
AMC MEMBER

YOUR WILL ... YOUR WORDING



IF YOU ARE THINKING OF INCLUDING
SCOTCH COLLEGE, OR THE SCOTCH
COLLEGE FOUNDATION, IN YOUR WILL,
THANK YOU.

We recommend that you seek independent financial and legal advice when writing your Will or adding a Codicil to your Will.

You can choose to assist Scotch College, or the Scotch College Foundation, by using any of the suggested wordings.

You may like to discuss your wishes with the Scotch College Bequest Program Manager, especially if you would like to tailor your gift to a particular purpose. From the School's perspective, the less encumbered the gift is, the easier it is to execute. All communications will be treated in the strictest confidence.

If you have already made a Will and would like to include a bequest to Scotch College, or to the Scotch College Foundation, you can do so by executing a Codicil, which amends your existing Will without drawing up a new one. A Codicil form is included with this booklet.

SUGGESTED WORDINGS

GIFTING A SPECIFIC GIFT

You may choose to give a specific item of property such as land or shares. Some choose to leave a cash amount in their Will. To maintain the value of your cash gift over time we suggest you link it to CPI:

I give free of all duties [insert specific gift] to **Scotch College, Melbourne** (ABN: 86 852 826 445) for its:

- General Purposes
- Building Fund
- Archive/Museum Fund

I declare that the receipt of the Director of Development or other authorised officer of the College shall be sufficient discharge to my Executor/s.

I give free of all duties [insert specific gift] to the **Scotch College Foundation** (ABN: 42 672 231 245) for its:

- Scholarship Fund
- Indigenous Scholarship Fund
- Endowment Fund (Corpus)

I declare that the receipt of the Director of Development or other authorised officer of the College shall be sufficient discharge to my Executor/s.

GIFTING THE RESIDUE OF YOUR ESTATE

A residuary bequest generally refers to what remains of your estate once you have provided for your family and friends (and any creditors):

I give free of all duties the residue of all my estate, both real and personal, to **Scotch College, Melbourne** (ABN: 86 852 826 445) for its:

- General Purposes
- Building Fund
- Archive/Museum Fund

I declare that the receipt of the Director of Development or other authorised officer of the College shall be sufficient discharge to my Executor/s.

I give free of all duties the remains of all my estate, both real and personal, to the **Scotch College Foundation** (ABN: 42 672 231 245) for its:

- Scholarship Fund
- Indigenous Scholarship Fund
- Endowment Fund (Corpus)

I declare that the receipt of the Director of Development or other authorised officer of the College shall be sufficient discharge to my Executor/s.

GIFTING ALL OR A PERCENTAGE OF THE RESIDUE OF YOUR ESTATE

You may choose to give all or a specific percentage of your entire estate:

I give free of all duties ___% / all of the residuary of my estate, both real and personal, to **Scotch College, Melbourne** (ABN: 86 852 826 445) for its:

- General Purposes
- Building Fund
- Archive/Museum Fund

I declare that the receipt of the Director of Development or other authorised officer of the College shall be sufficient discharge to my Executor/s.

I give free of all duties ___% / all of the residuary of my estate, both real and personal, to the **Scotch College Foundation** (ABN: 42 672 231 245) for its:

- Scholarship Fund
- Indigenous Scholarship Fund
- Endowment Fund (Corpus)

I declare that the receipt of the Director of Development or other authorised officer of the College shall be sufficient discharge to my Executor/s.

If you would like to give a specific asset which could have capital gains tax benefits we suggest you contact our Bequest Program Manager.



“LET NOT THE COLONISTS OF AUSTRALIA FELIX FORGET THAT THEIR MAIN SOURCE OF CONFIDENCE MUST BE THEIR OWN EFFORTS, AND THE BENIGNANT BLESSING OF OUR GOD. THEY CAN, I APPREHEND, DO MORE FOR THEMSELVES THAN ALL THE RULERS AND GOVERNORS ON EARTH ARE LIKELY TO DO FOR THEM.”

THE REVEREND JAMES FORBES
FOUNDER, SCOTCH COLLEGE



FREQUENTLY ASKED QUESTIONS



My bequest is not likely to be large; is it worthwhile to give?

Yes, it is absolutely worthwhile. Over time, and with sound management to retain and grow the capital, funds invested distribute many times their initial capital value to assist the School and Scotch boys. Even modest gifts can have a substantial impact in assisting boys with financial need. It is your commitment to securing our future that counts.

I would love to give a scholarship now and see it benefiting students in my lifetime, but will only have sufficient funds for the capital required through my Will – are there any options?

Yes, some donors would love to start a scholarship program in their lifetime and can do so by committing to fund the fees on an annual basis, and then provide the capital sum for a perpetual scholarship via a gift in their Will.

Is there a minimum bequest for establishing a perpetual scholarship?

Yes, in general the minimum donation required to establish a named Academic/Music/Boarding/Indigenous Scholarship in perpetuity is \$750,000. Smaller amounts are welcome and can be directed to the Scotch College Foundation Scholarship Fund.

I am not sure whether to leave a specific amount or a percentage of my Will.

Given the significant change in the value of money over time, and to save you revising your Will regularly, a gift as a percentage of your Will maintains the real value of what you intend to give to Scotch and to other beneficiaries.

I am thinking about leaving my bequest with a separate external entity to manage and distribute annual amounts – would this save Scotch some work and hassle?

The Foundation has the benefit of expert advice to carefully and conservatively manage all of its endowed funds, to maximise their return on a long-term basis. An important part of the Foundation's role is to provide advice and oversight on funds which have been entrusted to Scotch, and ensure they are used as the donor intended.

The Board also has the benefit of external expert advice. This is performed without cost to the Foundation's endowed funds. Commercial entities often charge significant fees for their services which reduces the impact of your gift.

We recommend that you seek independent financial and legal advice when writing your Will or adding a Codicil to your Will.





THANK
YOU



All information reflects policy and practice in force at the time of publication.

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THE FUTURE SUCCESS OF SCOTCH IS DEPENDENT
ON THE GENEROSITY OF ALL OF US TODAY.

Thank you for considering a gift in your Will to
Scotch College or to the Scotch College Foundation.

Each bequest of any size matters; even modest gifts can have
an amazing and lasting impact on the lives of our boys.

“Scotch’s story is their story; the contributions they have
made in their fields of endeavour, the impact they
have made within and across their communities,
and the difference they have made to those around them.

The future success of Scotch is dependent
on the generosity of all of us today.”

ASSOCIATE PROFESSOR DOUG LORDING ('64),
SCOTCH COLLEGE FOUNDATION PRESIDENT



ALEXANDER
MORRISON
CIRCLE



SCOTCH
COLLEGE
MELBOURNE

FOUNDED 1851



SCOTCH COLLEGE
FOUNDATION