

Notes:

1. The following sets of template wording (shown in quotation marks below in each case) are alternatives. *Only one* set should then be selected depending on whether he/she is giving a specific sum of money to your charity.
2. In either case, you might also include the alternative set of template wording “C” (shown in quotation marks above) if he/she wishes.
3. Each set of template wording should be preceded by an introductory paragraph. We suggest that you include similar, together with that wording, in the legacy literature you send to your website, to explain the purpose of the wording.

EITHER

A. TO LEAVE THE RESIDUE OF MY ESTATE TO MY CHARITY

Introductory wording

If you would like to leave all or part of my estate to [insert name of your charity], then after any specific gifts of money to my family, friends, or other charities, [insert name of your charity] will receive all or part of the residue of my estate. To do this, we suggest the following wording in your Will. It is worth remembering that all gifts left to UK-charities are exempt from inheritance tax - and so your charity could help your family avoid paying inheritance tax.

Form of wording to be included in my Will:

“I give [all] or [a xx% share] of the residue of my estate to [insert full legal name of your charity] of [insert full address of your charity] charity registration number [insert charity registration number] for its general charitable purposes. I declare that the charity is duly authorised by the charity to accept the same on my behalf and that the executors”

state to [insert name of your charity], that if the Will have been given to family, friends or other charities, [insert name of your charity] will receive all or part of the residue of my estate. To do this, we suggest the following wording in your Will. It is worth remembering that all gifts left to UK-charities as [insert name of your charity], are exempt from inheritance tax - and so your charity could help your family avoid paying inheritance tax.

Form of wording to be included in my Will:
“I give [all] or [a xx% share] of the residue of my estate to [insert full legal name of your charity] of [insert full address of your charity] charity registration number [insert charity registration number] for its general charitable purposes. I declare that the charity is duly authorised by the charity to accept the same on my behalf and that the executors”

OR

B. TO LEAVE A SPECIFIC SUM OF MONEY TO MY CHARITY:

Introductory wording

If you would like to leave a specific sum of money, for example £1,000, we suggest that you consider leaving it to the charity, remembering that all gifts left to UK-charities are exempt from inheritance tax - and so you will not be paying inheritance tax.

Form of wording to be included in your Will:

"I give free of all tax the sum of [insert full registered office address] of [insert full registered office number] [insert number of your charity] charity registration number [insert charity registration number] to my executors to be paid to the charity to do so shall be a full and complete discharge of my liability to my executors"

[insert name of your charity] in your Will, for the purposes of the gift, according to the provisions of your Will. It is worth noting that as [insert name of your charity], are a charity, your gift to the charity could help your family avoid paying inheritance tax.

Form of wording to be included in your Will:

"I give free of all tax the sum of [insert full registered office address] of [insert full registered office number] [insert number of your charity] charity registration number [insert charity registration number] to my executors to be paid to the charity to do so shall be a full and complete discharge of my liability to my executors"

OPTIONAL

C. TO ENABLE EXECUTORS TO PAY THE GIFT TO THE CHARITY AS NAMED IN WILL CEASE TO EXIST

Introductory wording explaining the gift to be paid to the named charity

The following wording can be added to the gift to the charity wording you are including in your Will. We recommend you include this additional wording, but we recommend you check with your solicitor the same charitable purposes as those of the charity to which the executors to pay your gift to our charity.

Form of wording to be added to the gift to the charity

"If before my death (or after my death) the said charity (1) changed its name; or (2) transferred its assets to another charity; or (3) has ceased to exist then this gift shall not fail and shall be paid to the charity named in the first case to that charity to which the gift has been made or with which it has become incorporated or amalgamated or to such other charity as they consider most nearly

WHERE YOUR CHARITY CEASES TO EXIST

Introductory wording explaining the gift to be paid to the named charity

The following alternative sets of wording can be added to the gift to the charity wording you are including in your Will. We recommend you check with your solicitor whether or not to include this additional wording, but we recommend you check with your solicitor the same charitable purposes as those of the charity to which the executors to pay your gift to our charity.

Form of wording to be added to the gift to the charity

"If before my death (or after my death) the said charity (1) changed its name; or (2) transferred its assets to another charity; or (3) has ceased to exist then this gift shall not fail and shall be paid to the charity named in the first case to that charity to which the gift has been made or with which it has become incorporated or amalgamated or to such other charity as they consider most nearly