

Legacies to Charities (Draft Form for use with Wills)

FORM OF WORDS TO USE TO CREATE A LEGACY IN A WILL OR ORDER TO LEAVE A GIFT TO YOUR CHARITY

I [full name]

of [full address]

Declare this to be a (~~delete~~)
codicil to my last Will which I made on [date]
[testator] of [insert full address]

In addition to any legacies given by me to [insert full legal name of your charity] of [insert full address] [insert charity registration number [insert number]]

¹EITHER

[the sum of £[insert figure]]

OR

[a [insert figure] % share of the

OR

[[describe items/ of property]
for its general charitable purposes]

[²If before my death (or after my death) the said charity has
effect to the said gift) the said gift shall have effect to the said charity if

(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 have effect as if it had been made in the first case

¹ All three options (i.e. the wording "[... the sum of £[insert figure]]" or "[a [insert figure] % share of the" or "[describe items/ of property] for its general charitable purposes]" should be included by the charity in the Codicil form that it gives to a donor; it will be the donor's responsibility to ensure that the gift is devoted to the same charitable purposes as those of the named charity for any of the reasons stated in the additional wording to donors. This footnote is not part of the draft wording for a Codicil to a donor.

² This additional wording (i.e. "If before my death (or after my death) the said charity has effect to the said gift) the said gift shall have effect to the said charity if" or "then this gift shall not fail and shall have effect as if it had been made in the first case") can also be included in the draft Codicil by the charity in its discretion. It is recommended that the charity should delete it before passing on the draft wording for a Codicil to a donor.

DONOR'S EXISTING WILL IN THE EVENT OF THE CODICIL

(~~delete~~) [first][second][third]

[will] of me [insert full name of testator]

to [insert full legal name of your charity] of [insert full address] [insert charity registration number [insert number]]

[delivery]]

my executors have given

ated or amalgamated with

ive effect to it as if it had
ed name or in the second

[describe items/ of property..]) should be included by the charity in the Codicil form that it gives to a donor; it will be the donor's responsibility to ensure that the gift is devoted to the same charitable purposes as those of the named charity for any of the reasons stated in the additional wording to donors. This footnote is not part of the draft wording for a Codicil to a donor.

charity.....") can also be included in the draft Codicil by the charity in its discretion. It is recommended that the charity should delete it before passing on the draft wording for a Codicil to a donor.

case to that charity to which
become incorporated or ama
as they consider most nearly

In all other respects I confirm

I declare that the receipt giv
duly authorised by the chari
my executors.

Signed:

We confirm that this codicil
presence and then by us in h

Witness 1

Name:

Address:

.....

Occupation:

Date:

Signed:

Note to donor: Please keep this Cod

made or with which it has
case to such other charity
said charity]

isting codicils thereto.

ert full name of your charity]

l and sufficient discharge to

.....

e named testator in our joint

Witness 2

ame:

ddress:

.....

ccupation:

ate:

igned:

your Will.