

The Parish of Haslemere

Preparing your Will



Parish of Haslemere
ST BARTHOLOMEW'S AND ST CHRISTOPHER'S



It is important for everyone in our church family to make a Will and review it regularly. As you do so I hope you will remember your local churches by leaving a legacy gift.

Your legacy gift will enable us to keep our mission and ministry alive and vibrant and secure our future presence and witness in the Parish.

Thank you and may God bless you,

Revd Chris Bessant, Team Rector



This leaflet is designed to help and guide you in the event that you choose to leave the church a gift in your Will.

We will discuss with executors the most appropriate use of the gift in the light of current projects and the donor's known areas of interest.

We would strongly advise that you see a solicitor when making your Will or amending an existing Will.

“LORD our God, all this abundance that we have provided for building you a temple for your Holy Name comes from your hand, and all of it belongs to you.”

Wording for your Will

Should you decide to make a gift to Haslemere Parish, you can choose to leave either a share of the residue of your estate or a fixed amount. It is very simple to leave a gift to our parish in your Will. If you would like to leave a share of the residue of your estate, your legal adviser may find the following wording helpful:

“I give _____% of my residuary estate free of all taxes to the Parochial Church Council of the Ecclesiastical Parish of Haslemere (registered charity number 1127927) in the Diocese of Guildford for its general purposes, and I declare that the receipt from an officer for the time being of the Parochial Church Council shall be a sufficient discharge to my executors and trustees.”

Should you wish to make a gift of a fixed amount, set out below is suggested wording which your legal adviser can use:

“I give the sum of £_____ (pounds only) free of all taxes to the Parochial Church Council of the Ecclesiastical Parish of Haslemere (registered charity number 1127927) in the Diocese of Guildford for its general purposes, and I declare that the receipt from an officer for the time being of the Parochial Church Council shall be a complete discharge to my executors and trustees.”

Tax and making a charitable donation in your Will.

Please remember that as Haslemere Parish is a registered charity (no 1127927) your legacy gift will be exempt from Inheritance Tax. We recommend that you seek legal advice from your legal adviser. We would further recommend using a member of STEP (Society of Trust and Estate Practitioners) or Solicitors for the Elderly.

Please note under present legislation should you give 10% or more of your residuary estate to a charity, you would pay a reduced rate of Inheritance Tax.

Using a Codicil to revise your Will

Everybody's circumstances change over time and so it is sensible to review your Will regularly and check that it still reflects your wishes. Many people revisit their Will every 5 years or whenever a 'life cycle event' occurs such as the birth of a grandchild.

If you find that you need to make changes to your Will, you should seek advice from a solicitor. It won't cost much to make simple changes but if changes are not made correctly, your Will could become invalid.

If you simply want to add a gift into your Will without the cost of consulting a solicitor, you can do that by using a codicil form. A codicil is a legal document which enables you to amend your existing Will.

The codicil form opposite lets you to add a gift to your local church easily and quickly if you have already written your Will.

All you need to do is to complete the codicil form and sign and date it in front of 2 witnesses (who must not be a beneficiary or the spouse of a beneficiary). The witnesses should then each sign the codicil in your presence and in the presence of each other. Once completed, the codicil should be kept with your original Will.

Codicils work best for adding a cash gift to your Will. You could use the codicil form to add a gift of a proportion or % of your estate but, be careful that the gifts already in your Will and the additional gift in your codicil do not add up to more than 100%! If in doubt, you should seek advice from a solicitor.

Codicil Template

Codicil

I,(name)
of(address)
declare this to be the.....(1st/2nd/3rd etc) Codicil to my Will dated(date).

I give:% of my residuary estate OR a gift of £

(.....) [choose one of these options and delete the other. If choosing the latter option, insert amount in numbers then, in the brackets, in words] free of all taxes to the Parochial Church Council of the Ecclesiastical Parish of Haslemere (registered charity number 1127927) in the diocese of Guildford for its general purposes and I declare that the receipt from an officer for the time being of the Parochial Church Council shall be a sufficient discharge to my executors and trustees. In all other respects I confirm my Will and any previous codicils thereto. In witness whereof I have hereunto set my hand on this the
.....(date)

Signature(your signature)

This codicil was signed by the above named person in our joint presence, and then by us in his/hers.

Signature(witness signature 1)

Name

Address.....

Signature(witness signature 2)

Name

Address.....

A Letter of Wishes alongside your Will

A Letter of Wishes is an informal letter that accompanies your Will. It can be a very useful document in assisting your Executors and Trustees to ensure your personal wishes are carried out. It does not change or revoke your Will.

As needs change over the years, most Parochial Church Councils (PCCs) encourage gifts in Wills to be left for the general purposes of the parish rather than for a restricted purpose.

When the time comes, the PCC will discuss possible uses of your gift with your Executors bearing in mind your Letter of Wishes and the churches' priorities at the time.

You can use the Letter of Wishes Template opposite to share your personal wishes.

The contents of the Letter of Wishes will depend on your individual circumstances. You must take care that your Letter of Wishes does not contain anything that could conflict with your Will.

You can write or type the Letter of Wishes yourself. It should be written in plain English, signed and dated by you and addressed to your Executors. It is not legally binding and does not require witness signatures.

You can also specify the type or style of funeral you want, including any specific instructions regarding the service.

Letter of Wishes Template

To My Executors / My Family / My Trustees / The Person To Whom It May
Concern

I, _____ (name)
of _____ (address)

wish to state my wishes with respect to my gift to charity and my funeral wishes.

I understand that I may not restrict your actions, but I ask you to consider the
following when making decisions in regards to how my gift to charity is used.

This Letter of Wishes does not change or revoke my Will.

My Funeral Wishes are: _____

_____ (date)

Signature _____ (your signature)

