

Leaving a gift in your Will

It helps our planning if you let us know about your intentions



Your details

Title:

Initials:

Surname:

Address:

Postcode:

Phone number:

Date:

Please tick all the appropriate boxes

- I would like to talk to someone to see how gifts in Wills can help Alabaré
- I intend to leave a gift to Alabaré in my Will
- I have already left a gift in my Will to Alabaré
- Please do not write to me again about leaving a legacy

Leaving a gift in your Will

Frequently Asked Questions

I've already made a Will - how easy is it to change it?

Your solicitor can help you to add a form called a codicil to your existing will. Don't make changes yourself as it could render your existing Will invalid if it isn't done correctly. You'll also find a Codicil form and instructions in this legacy information pack.

Can I talk to someone about my will making and leaving a legacy to Alabaré?

We are always happy to help you with any queries you may have. If you would like to talk to someone you can talk in confidence with Claire Sime, our Individual Giving Manager. Please call Amanda on 01722 344483 to arrange a convenient time for her to call.

Can I avoid Inheritance Tax with a legacy to the Trust?

The Inheritance Tax threshold is currently £325,000. Inheritance Tax is presently set at 40% but there are exemptions - particularly if you leave money to a church or charity. Any gift you leave to Alabaré and other charities will be deducted from your estate before any tax liability is calculated. Also, from 6th April 2012, if you leave 10% or more of your estate to a church or charity, you'll be taxed at a lower rate (36% rather than 40%) on any part of your estate that qualifies for inheritance tax. Inheritance Tax rates and exemptions do change, so please consult your advisor.

Can I give a copy of my signed Will to anyone for safekeeping?

Make sure you keep the original in a safe place such as your bank or solicitors. It is also wise to tell your Executor(s) where they can find the original. We also recommend making a couple of copies of your Will, one for you to keep and one for you to give to your Executor(s). Alabaré cannot hold any copies of Wills.

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Can I choose what my legacy is spent on?

Yes you can. But we particularly welcome legacies that can be used our discretion so that we are able to use it wherever the need is greatest. We are independent of local and national government and in the past have been able to respond rapidly to new needs in new areas and with different client groups. If a gift is too restrictive, that might make it difficult. You may like to discuss with your Executors and the charity how your gift can best reflect your wishes and interests.

Can you advise on appropriate wording to put in my Will to include a legacy to Alabaré?

You'll find some suggested wording below. We strongly advise that you use a qualified solicitor to amend an existing Will or to include a legacy in a new Will to ensure your wishes are properly recorded.

"I bequeath to Alabaré Christian Care and Support (registered charity number 1006504) for its general purposes either "the residue of my estate" or "my Executors shall divide the residue of my estate into equal shares and shall hold such shares as follows

a) As to (specify number) such shares for Alabaré Christian Care and Support absolutely

b) As to (specify number) such shares for (legatee) of (address) absolutely etc."

Or "(specify sum, item, share of residue)"

and I declare that the receipt of an officer from Alabaré shall be sufficient discharge for my Executors/Trustees

Or

"I bequeath to Alabaré Christian Care and Support (registered charity number 1006504) (specify sum or share of residue) for the maintenance and development of the building/mission and outreach or other purposes at its discretion and I declare that the receipt of an officer from Alabaré shall be sufficient discharge for my Executors/Trustees.

Can I make Alabaré one of my executors?

It would be inappropriate for an official from Alabaré to act as an Executor. We recommend that you ask friends or family or seek advice from your solicitor.

How does Alabaré record and acknowledge legacy gifts?

We are always extremely grateful to receive legacy gifts. If there are specific ways that you would like your gift to be recognised (for example in one of our homes) we would love to talk to you about that. Unless there has been a request made for anonymity, your name will appear in our Book of Remembrance, which is kept in Alabaré as a tribute to all our benefactors. We also report all legacy gifts in our annual review.

Codicil to your Will

If you would like to add a gift to Alabaré to your existing Will, you can easily do so by using a Codicil. A codicil is a supplement to a Will that can make changes or amend and allow additions to part of that Will.

Simply complete the attached codicil form, sign it in the presence of two witnesses, and keep it with your existing Will (see next page from solicitor approved 'signing instructions').

If you have made more than one Will, it is important to ensure that this Codicil relates to your most recent Will. It is also important, to avoid confusion, to identify clearly whether this is the first codicil to your Will, second or third and so forth.

We particularly recommend that you consult a solicitor if your Will already has a Codicil(s). We also advise you to seek legal advice if you are making substantial changes to your Will, for example leaving a gift of residue (i.e. leaving what is left in your estate to someone after specific gifts have been given beneficiaries).

Creating a new Will is the best way to avoid any errors or disputes if you are looking to modify your existing Will. Should you require any further information, please contact Claire Sime, our Individual Giving Manager. All enquiries will be treated in confidence. He is not qualified to give legal advice. If you are worried about how best to draft a Will or codicil, we do recommend you obtain professional advice from a solicitor with experience in Wills and probate.

How to complete your Codicil

Following these instructions carefully will help to make sure that your Codicil is not invalid in any way.

You must have two adult witnesses. No beneficiary or Executor of your Will (or anyone who is married to, or in a civil partnership with, a beneficiary or Executor) can be a witness. Witnesses do not have any right to see what is in the Codicil unless you choose to show them.

- 1) Date the bottom of the Codicil form.
- 2) Sign your name in the presence of the two witnesses. Ask them to sign and write their names, addresses and occupations on the Codicil. All of you must be present while each of you signs.
- 3) Keep the codicil in a safe place will, but not attached to, your current Will.
- 4) Send or give a copy of the Will and Codicil (in a sealed envelope, if you prefer) to your Executor or a trusted friend. Indicate with a note where the originals are held. It is important that the original Will and Codicil are kept together and that those who have a copy of your Will will also have a copy of the Codicil. This will minimise the potential for later confusion.

Codicil



I (Full name)

Of (Address)

Postcode:

Declare this to be a First Second Third Codicil to my Will,

Dated and made the Day/Month/Year (date of original will)

I give (Please tick one):

The following specific item(s), namely

The sum of £.....(fill in the amount)

To Alabaré Christian Care and Support (registered charity number 1006504), for its general charitable purposes, and I direct the receipt(s) of an officer of Alabaré shall be sufficient discharge of my Executor/Trustees.

In all other respects I confirm my will and any other Codicils thereto.

Signature Date

Signed by the aforementioned in our presence and witnessed by us in the presence of him/her and of each other:

Witness One		Witness Two	
Name		Name	
Address		Address	
Postcode		Postcode	
Occupation		Occupation	
Signature		Signature	
Date		Date	