

900
BARTS
— 1123 - 2023 —



ST BARTHOLOMEW
THE GREAT

LEGACY – LEAVING A GIFT IN YOUR WILL

AN OPPORTUNITY TO INVEST, RESTORE, AND REJOICE IN THE FUTURE

Choosing to make a gift to our 900th Anniversary Campaign in your Will means being able to take your commitment to spiritual, musical, or cultural activity at St Bart's into the future. In leaving a legacy, you'll be ensuring that long after you're gone, your enthusiasm for enriching life with worship, song, and service to others still continues.

THE IMPORTANCE OF MAKING A WILL

Making your Will now will give you the peace of mind to know that your loved ones will be looked after and your wishes will be carried out after your death. You can update your Will at any time, if and when your circumstances change.

There are a number of specific reasons for making a Will:

1. If you do not make a Will, your estate will pass under the Intestacy Rules and you have no control over how your estate passes. None of your estate would pass to charity.
2. Planning your Will carefully can lead to a large saving in Inheritance Tax.
3. You will be able to pass your estate to people and organisations you most want to help and in whatever proportions you choose, thus helping to protect beneficiaries who need help.
4. You choose who you wish to be in charge of administering your estate. These people are called your Executors and in most professionally drafted Wills they would also be called your Trustees.

We recommend you seek advice from your solicitor in drawing up your Will as all solicitors are required to be fully regulated by the SRA.

WWW.GREATSTBARTS900.COM

INHERITANCE TAX

Inheritance Tax is payable if your taxable estate is worth more than the threshold set by the Government – currently £325,000 (£650,000 for a couple). Inheritance Tax of 40% is paid on the amount that exceeds this threshold. This means that for every £1 over the threshold, only 60p will go to your beneficiaries, with 40p going to the Government.* If you leave a charitable gift in your Will, the value will be deducted from your estate before Inheritance Tax liability is calculated, meaning less of your money is lost to the Government.

*Information correct at the time of print. For full details of Inheritance Tax, please consult HMRC or discuss with your solicitor.

WORDING IN YOUR WILL

You may choose to leave us a specific sum (pecuniary legacy), a specific non-money item (a specific legacy), or the whole, or a share of, your estate (a residual legacy). You may also wish that your legacy be applied for a specific purpose in which case we recommend that you contact us in advance.

WORDING FOR A PECUNIARY LEGACY:

I GIVE the sum of Pounds (£xxxxxxx) to The Ecclesiastical Parish of Great St Bartholomew (Registered charity number: 1163024) absolutely.

WORDING FOR A SPECIFIC LEGACY:

I GIVE to The Ecclesiastical Parish of Great St Bartholomew (Registered charity number: 1163024) absolutely.

WORDING FOR A RESIDUAL LEGACY:

I GIVE the residue of my estate to The Ecclesiastical Parish of Great St Bartholomew (Registered charity number: 1163024) absolutely.

OR:

I GIVE the residue of my estate to my Trustees to divide the same as X% for to The Ecclesiastical Parish of Great St Bartholomew (Registered charity number: 1163024) absolutely. and X% for xxxxxxxxxxxx absolutely.

WHICHEVER PARAGRAPH YOU CHOOSE TO PUT IN YOUR WILL,
WE RECOMMEND YOU ALSO ADD THE FOLLOWING:

AND I DECLARE THAT

- a. receipt of the legacy officer, treasurer or any other authorised officer of the above charity will be a sufficient discharge to my Trustees who need not thereafter be concerned to see how the legacy is applied.
- b. UNLESS I have stated that the legacy should be used for a specific purpose, the legacy can be used for the general purposes of the said charity.
- c. IF the said charity has changed its name or amalgamated with another charity, my Trustees will give effect to the legacy by paying it to the charity in its changed name or to the charity with which it has amalgamated.
- d. IF the said charity ceases to exist before my death, my Trustees will give effect to the legacy by paying it to any charity or charities of their choice whose objects appear to them most closely to fulfil the objects that I had intended to benefit.

If you decide to leave a legacy to The Ecclesiastical Parish of Great St Bartholomew in your Will we would be grateful, if you are willing to do so, to let us know.



LEGACY DECLARATION FORM

AN OPPORTUNITY TO INVEST, RESTORE, AND REJOICE IN THE FUTURE

This form is not legally binding. Please remember to formalise your wishes with your solicitor. You are within your rights to amend your Will at any time, but we would be very grateful if you could inform us if your circumstances change.

PERSONAL DETAILS

Title	Forename(s)	Surname
Address		
Postcode	Telephone number	Email address

BEQUEST DETAILS

I have left/intend to leave a gift to support the 900th Great St Bartholomew's Campaign in my will, brief details are:

Estimate value of this gift	Date
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Please tick if you would like to remain anonymous. Otherwise, we may list donors alongside other supporters in our Annual Report or online. Gift amounts will never be published.

Data Protection: The Ecclesiastical Parish of Great St Bartholomew collect, process and hold personal information in accordance with the Data Protection Act 1998, for their activities in supporting St Bartholomew the Great and St Bartholomew the Less. We do not share your personal details with other organisations. Registered Charity Number 1163024. Address: St Bartholomew The Great, Church House, Cloth Fair, Barbican, London EC1A 7JQ.

PLEASE RETURN
THIS COMPLETED
FORM TO:

Great St Bartholomew, Parish Office,
Church House, Cloth Fair, London EC1A 7JQ.



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GREAT ST BARTHOLOMEW
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Registered charity number: 1163024