

Suggested wording for your Will

We strongly suggest you ask a solicitor or a member of the Institute of Professional Willwriters (IPW) to write or amend your Will. They will be able to provide the best advice on the correct wording.



Please ensure that, whatever wording is used, any legacy to us includes our full name "British Heart Foundation", and "Registered Charity Number 225971" as this will avoid any doubt about our identity. If you wish, you can also include our current address "Greater London House, 180 Hampstead Road, London, NW1 7AW".

The following are examples of the wording for the three main types of gift:

Pecuniary legacy

1.1 I GIVE:-

- (a) £*[insert amount in numbers]* (*[insert amount in words]* pounds) to British Heart Foundation (Registered Charity Number 225971) of Greater London House 180 Hampstead Road London NW1 7AW to be applied for its general purposes

1.2 AND I DIRECT that

- (a) the receipt of the person who professes to be the treasurer or other proper office for the time being of each of the above mentioned charities shall be a complete discharge to my Executors
- (b) if before my death the above mentioned charity has changed its name or amalgamated with or transferred all its assets to any other body then my Executors shall give effect to the gift as if it has been made to the body in its changed name or to the body which results from the amalgamation or to which the transfer has been made.

Index-linked pecuniary

The figure entered would be the value of the legacy you would currently like to leave.

1.1 I GIVE:-

- (a) the sum of money produced by dividing £*[insert amount in numbers]* (*[insert amount in words]* pounds) by the index figure in the Index of Retail Prices ('the Index') for the month in which this Will is executed and (having made allowance for any re-basing of the Index which may have happened in the meantime) multiplying it by the index figure in the Index for the month in which my death occurs to British Heart Foundation (Registered Charity Number 225971) of Greater London House 180 Hampstead Road London NW1 7AW to be applied for its general purposes

1.2 a) & b) as above

- (c) if the Index is not available for the month in which my death occurs (because it has ceased to be published or for any other reason) my Executors (making use if they wish of any other index which may seem to them relevant and obtaining any advice which they may think desirable) shall reach a decision (which shall

bind the charity named above and everyone interested in my estate) as to what in their view the index figure in the Index for the month in which my death occurs would have been if it had been available and shall use the figure on which they decide for the purposes of the calculation.

Residuary legacy

1.1 I GIVE all (or... share) of my Residuary Estate to British Heart Foundation (Registered Charity Number 225971) of Greater London House 180 Hampstead Road London NW1 7AW to be applied for its general purposes

1.2 (a) & (b) as above

Specific legacy

1.1 I GIVE:-

(a) *[insert description of the item]* to British Heart Foundation (Registered Charity Number 225971) of Greater London House 180 Hampstead Road London NW1 7AW to be applied for its general purposes

1.2 (a) & (b) as above

The wording above could be used in a Will or Codicil. If you are updating an existing a Will you can choose either to make a completely new Will, or a Codicil which would set out changes to your existing Will and be read alongside it.

Other types of legacy

A conditional legacy can be made to cover the eventuality that you outlive all your named dependants, in which case the legacy is made to charity rather than them.

A life interest (reversionary) trust can be made to so that your named dependants benefit during their lifetime, either by using the asset or getting the income from it, with the charity receiving the asset after they have died.

Your solicitor or member of the Institute of Professional Will Writers would be able to provide more detailed advice on these types of bequest.