

## Information for legal professionals and executors

### When making a client's Will

To include the Macular Society in a Will, please include our name, address and registered charity number:

Macular Society  
Crown Chambers  
South Street  
Andover  
Hampshire SP10 2BN

Registered charity numbers: 1001198 in England and Wales, SC042015 in Scotland and 1123 in the Isle of Man.

Sample Will Wording and a Codicil Form are available to download separately if you wish. The wording document also contains guidance on restricted gifts. **[www.macularsociety.org/legacy](http://www.macularsociety.org/legacy)**

Macular Society is the trading name of The Macular Disease Society. If a will already contains a bequest to the Macular Disease Society, it doesn't need to be changed. Our registered charity numbers and charitable objectives remain the same.

If you have any questions at all, please do not hesitate to get in touch.

**Macular Society, PO Box 1870, Andover, Hampshire SP10 9AD**

**Telephone 01264 350 551 Helpline 0300 3030 111**

**Email [info@macularsociety.org](mailto:info@macularsociety.org) Web [www.macularsociety.org](http://www.macularsociety.org)**

## **When acting as executor in an estate**

If you're acting as executor for someone who has kindly included a gift to the Macular Society in their Will, please address all correspondence to:

Julie Edwards  
Legacies Manager  
Macular Society  
Crown Chambers  
South Street Andover  
Hants SP10 2BN

Direct telephone: 01264 321 965  
Email: [julie.e@macularsociety.org](mailto:julie.e@macularsociety.org)

Macular Society is the trading name of The Macular Disease Society.

Our registered office address is: Crown Chambers, South Street, Andover, Hants SP10 2BN.

Registered charity numbers: 1001198 in England and Wales, SC042015 in Scotland and 1123 in the Isle of Man.

Cheques should be made payable to Macular Society. To make payment by electronic transfer, please contact us for our bank details.

Before moving to our current office in Andover, the Macular Society used other addresses which still feature in older wills. Please contact us if the charity address given in the Will is not our current one.

## Are you a non-professional executor?

If you are acting as executor for a relative or friend's estate, thank you very much. Your time, dedication and effort in taking on this voluntary role are very much appreciated. If we can help you in any way, please call.

If the Macular Society is to benefit from a **cash gift** (a specified sum of money) in the Estate, please let us know and we will keep in touch to offer any assistance we can during the administration.

We've attached some guidance below on working with charities who are residuary beneficiaries (share of the residue) in an Estate, since our requirements then are different.

If you are administering an Estate in which registered charities feature as residuary beneficiaries, there are a number of documents that all of us will ask for.

If there's more than one charity, one of us will normally offer to act as "lead", saving you the time and cost of contacting us all individually during the administration of the Estate. You can send documents by post or email to the "lead" charity, who will forward them to the others and coordinate any response you need, such as which estate agent to choose or whether to appropriate any property being put up for sale, in order to minimise tax payable on the Estate.

The "lead" role often falls to the charity receiving the largest share; if we are all equal beneficiaries, the first-named or any of the others can take on the role. If the Estate is complex, it can be useful to ask one of the bigger national charities to lead, as they often have access to trained solicitors who can provide an expert view on legal matters. But we are all willing to help.

These are the documents we are all likely to ask for. At the start of the administration, could you please send us:

- a copy of the Will and any Codicils to it
- a schedule of assets and liabilities in the estate correct at the time of death
- if there is a property to be sold, two independent valuations by local estate agents, preferably before the property is put up for sale

Towards the end of the administration:

- draft final estate accounts for checking and approval. We strongly recommend you send these to the charities before distributing any cash or residuary gifts. It is much easier to correct errors (which can happen even with professionally produced accounts) before payments have been made to beneficiaries.

During the administration, charities will also welcome an update from time to time on the progress you are making. Being consulted on important matters such as the sale of shares or property is especially welcome. If we are consulted early enough, we may be able to save the Estate money by advising on things like the appropriation of property.

We will do our utmost not to bombard you with requests for information, but we may drop you a line if things go quiet for a few months, just to see how you're getting on and ask if we can help.

There's a wealth of experience and expertise in many of the charities who benefit from gifts in Wills – and it's free – so please ask and we'll do our best to help.

## **If you are organising the funeral**

We also have gift aid envelopes and coin boxes to help with funeral collections, as well as online pages which can be set up to enable those unable to attend to pay their respects. To request these items please call us or see our Give In Memory pages.

**[www.macularsociety.org/inmemory](http://www.macularsociety.org/inmemory)**

Julie Edwards

Direct telephone: 01264 321 965

Email: [julie.e@macularsociety.org](mailto:julie.e@macularsociety.org)

Debbie Smith

Direct telephone: 01264 326 620

Email: [debbie.s@macularsociety.org](mailto:debbie.s@macularsociety.org)

The information contained on our website relating to Wills, estate planning, inheritance tax and similar matters is outline information of a general nature only. The Macular Society cannot and does not provide financial or legal advice as such, for which you should consult a solicitor or accountant before making a Will or planning your financial affairs.

Last updated: 4 April 2018