

How to leave a gift in your Will

Thank you for considering a gift in your Will to the Macular Society. You can use the recommended wording in this document to include the Macular Society in a new Will or one that you are updating.

Can we help you?

We're here to help, so if you have any questions please contact:

Julie Edwards: 01264 321 965
julie.e@macularsociety.org

Caroline Bowyer: 01264 321 988
caroline.bowyer@macularsociety.org

We can also provide this information in a large print booklet and audio CD.

Thank you so much for thinking of including the Macular Society in your Will. Your gift will help increase our investment in ground-breaking research into macular disease and ensure no one has to face this devastating condition alone.

We'd be privileged to hear more about why you have chosen to remember us. We can keep you informed about aspects of our work that particularly interest you.

But if you'd rather not tell us, that's fine. We know it's a very personal decision, so we'll just say a very big thank you, once again, for thinking of us.

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

Telephone 01264 350 551 Helpline 0300 3030 111

Email info@macularsociety.org Web www.macularsociety.org

Making or updating your Will

Everyone's circumstances are different so we recommend that you consult a professional advisor.

You can find a solicitor who deals with Wills, Probate and Estate Planning on the Law Society's websites:

solicitors.lawsociety.org.uk in England and Wales

www.lawscot.org.uk/find-a-solicitor in Scotland

www.lawsoc-ni.org/solicitors in Northern Ireland

Solicitors for the Elderly also has a database of solicitors experienced in working with older clients. Many will offer a home visit if required.

www.sfe.legal/public/search

We do not endorse any firms but can send you a large print list of solicitors in your area on request.

Our details

To include the Macular Society in your Will, you'll need 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.

Suggested wording to leave a gift to the Macular Society in your Will

To leave a simple cash donation:

“I give to the Macular Society, Registered Charity Number 1001198 (SC042015 in Scotland, 1123 Isle of Man), Crown Chambers, South Street, Andover, Hants SP10 2BN the sum of

£ ... [amount in figures and words] and I express the wish (but without imposing any binding obligation) that the money be used for the general purposes of the Macular Society.

The receipt of the Treasurer or other proper officer of the Macular Society shall be a good discharge to my trustees for the gift.”

To leave a share in your residuary estate

(e.g. if you want to split the remainder of your estate between two or more charities or a mix of charities and individuals. To do this, you split your residual estate into equal parts, then decide how many of those parts each recipient should receive).

“I give all the residue of my estate (out of which shall be paid my funeral and testamentary expenses and my debts) to my trustees ON TRUST to divide it or treat it as being divided into [number] shares of equal value and shall hold them ON TRUST absolutely

i) as to [number] such equal shares for the Macular Society, Registered Charity Number 1001198 (SC042015 in Scotland, 1123 Isle of Man), Crown Chambers, South Street, Andover, Hants SP10 2BN and I express the wish (but without imposing any binding obligation) that the money be used for the general purposes of the Macular Society.

ii) as to [number] such equal shares [specify other beneficiary]. (This wording is repeated for each new beneficiary).

I declare that if the share in the residue of my estate of any beneficiary named above does not qualify for exemption from inheritance tax, that share shall bear its own inheritance tax so that the amount received by each beneficiary named in that clause before the payment of inheritance tax is the same.

The receipt of the Treasurer or other proper officer of any charitable body to which any gift is made by (or under provision of) this Will shall be a good discharge to my trustees for the gift.”

How we'll spend your thoughtful gift

We will spend your legacy gift on vital support services to help people living with macular disease all over the UK, as well as on ground breaking research to find an eventual cure.

You may wish your gift to be spent specifically on research, or to be shared with our local support services.

If so, please express this preference as a “wish” in your Will, using the recommended wording above and changing the words “for the general purposes of the Macular Society” to [for example] “research into macular disease”.

Please rest assured that we will respect your wishes whenever we can. Do get in touch with us if you have a question about how we will use your gift.

It's also worth discussing your intentions with close family if you can, so that they understand and respect your wishes. It's also useful to tell your solicitor why you wish to support your chosen charities.

Not making a new Will?

We also have a **Codicil Form** available to download if you already have a Will and simply want to add a cash gift to it without changing the rest.

www.macularsociety.org/legacy

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