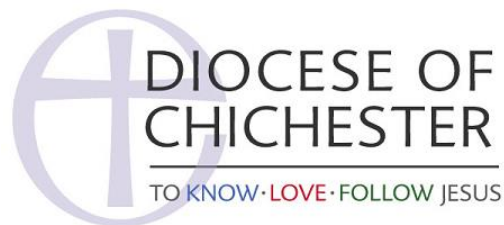


Instructing a professional to help you prepare/amend a will

A full range of additional information can be found online
at www.churchlegacy.org.uk



Part 1 – PCC TREASURER or GIVING OFFICER: Please complete these details

Full name of Parish (including dedication of church, if any):

Town/village/locality:

Please be sure to complete this so that there can be no doubt which particular parish is intended as the beneficiary

Charity number:

Not all PCCs are individually registered with the Charity Commissioners: if your PCC is not registered, this field should be left blank

Part 2 – DONOR: Finding a professional adviser

Decide which professional adviser you will use. If you have a family solicitor that may be a starting point. Otherwise you can find a professional adviser by searching the listings on one of these websites:

www.willaid.org.uk

Under this scheme, a local professional writes your will, and you are invited to donate to charity instead of paying a fee. The scheme operates each November

www.lawsociety.org.uk

The Law Society represents solicitors who will offer you advice on all aspects of the law. Many solicitors will offer a fixed price for straightforward wills.

www.step.org

This organisation has members who are practitioners in the field of trusts and estates, and may suggest a qualified professional adviser.

Write the name and address of the adviser or firm below

To:

I am thinking about leaving a legacy to my local church. Please contact me to discuss my requirements.
(Tick any of the boxes below that apply – this will save some time when your professional adviser contacts you)

- I do not currently have a will
 I have a will that may need revising

My preferred method of contact is

- Letter
 Phone
 Email

My existing will, or a copy of it

- Is lodged with your firm
 Is enclosed with this form
 Will be with me when we meet
 Is lost or mislaid

- I will be accompanied by my partner/spouse if or when we meet
 Please contact my church to inform them once the legacy has been arranged

Your signature:

Today's date:

Your full name:

Telephone number:

Your address:

Postcode:

Email:

Part 3 – SOLICITOR or PROFESSIONAL ADVISER: Useful information

- Please contact the person named above to discuss the requirement
- The church's preferred wording for wills and legacies is:

I give [the sum of ENNNN] OR [x% of my residuary estate] free of all taxes to the Parochial Church Council of [St. Wilbert's, Eastcliffe] in the Diocese of Chichester, registered charity number 999999 and its successors for its general purposes, and I declare that the receipt of an officer of the Council shall be sufficient discharge to my executors.

- If the testator has asked you to notify the church that the legacy has been arranged, please contact the Diocese of Chichester, 211 New Church Road, Hove BN3 4ED (01273 421021)

A full range of additional information can be found online at www.churchlegacy.org.uk

When Parts One and Two are complete, please send this whole form to the solicitor or firm you have identified in Part Two