



## How to word your legacy

Outlined below are the main types of legacy and suggested wording for inclusion in your Will. Your solicitor may find the wording below useful to refer to if you are making or changing your Will. We strongly recommend that you consult an experienced solicitor to ensure your wishes are carried out.

**Residuary legacy:** the residue of the estate or a percentage of the residue which is everything remaining after all the debts, expenses and legacies have been paid. This allows the value of the gift to stay in proportion to the size of the estate.

**Pecuniary legacy:** a fixed sum of money which is made explicit at the time of writing a Will.

**Specific legacy:** a gift of goods which is made explicit at the time of writing a Will, for example property or shares.

**Reversionary legacy:** Quartet will not inherit until after the death of another person, who has the benefit of the estate during their lifetime. This ensures that the needs of the testator’s family are protected during their lifetime and Quartet ultimately benefits.

## Specimen wording

### For general support

“I give to Quartet Community Foundation, Royal Oak House, Royal Oak Avenue, Bristol BS1 4GB, registered charity number 1080418, absolutely

(residuary legacy)	all/a ..... share of the residue of my estate
(pecuniary legacy)	the sum of £.....
(specific legacy)	(a number of/my) shares in ..... (public limited company) <u>or</u> my ..... (specified item)

and I direct that (i) the assets comprising such residue may be used for the general charitable purposes of Quartet Community Foundation at the discretion of the Trustees, and (ii) a receipt signed by a person for the time being authorised by the Trustees of Quartet Community Foundation shall be a good and sufficient discharge to my executors.”

**To include instructions as to how the money is to be spent**

“I give to Quartet Community Foundation, Royal Oak House, Royal Oak Avenue, Bristol BS1 4GB, registered charity number 1080418, absolutely ..... (describe what is being given, as above) to be applied by Quartet

(to benefit a geographical area)	for the benefit of the community in (e.g.) Bath & North East Somerset
(to benefit particular groups of people)	To meet the needs of (e.g.) disadvantaged children and young people

at the discretion of the Trustees and in accordance with the terms of its Memorandum of Association and I direct that a receipt signed by a person for the time being authorised by the Trustees of Quartet Community Foundation shall be a good and sufficient discharge to my executors.”

**To contribute to a Named Fund that has already been established**

“I give to Quartet Community Foundation, Royal Oak House, Royal Oak Avenue, Bristol BS1 4GB, registered charity number 1080418, absolutely ..... (describe what is being given, as above) to be applied by Quartet for the benefit of the .....Fund (insert name of Fund) at the discretion of the Trustees and in accordance with the terms of its Memorandum of Association and I direct that a receipt signed by a person for the time being authorised by the Trustees of Quartet Community Foundation shall be a good and sufficient discharge to my executors.”

**To create a new Named Fund (minimum £25,000)**

“I give to Quartet Community Foundation, Royal Oak House, Royal Oak Avenue, Bristol BS1 4GB, registered charity number 1080418, absolutely ..... (describe what is being given, as above) to be applied by Quartet for its general charitable purposes and I direct that it be paid into a restricted fund to be called The ..... Fund and used for ..... (include instructions as to how the income is to be spent if required, or ‘for general charitable purposes’) at the discretion of the Trustees and in accordance with the terms of its Memorandum of Association and I direct that a receipt signed by a person for the time being authorised by the Trustees of Quartet Community Foundation shall be a good and sufficient discharge to my executors.”

For further information, or for a discussion in confidence, please contact

**Ronnie Brown, Development Director**

Quartet Community Foundation, Royal Oak House,  
Royal Oak Avenue, Bristol BS1 4GB

Telephone 0117 989 7700 [ronnie.brown@quartetcf.org.uk](mailto:ronnie.brown@quartetcf.org.uk)