

HOW TO LEAVE THE PARISH A LEGACY IN YOUR WILL

A legacy, also known as a bequest, is a simple gift made in your Will, to a person or organisation (such as a charity). If you would like to make a gift to the parish in your Will you will need to provide your Solicitor or Will maker with a few of details:

Name: Portsmouth Roman Catholic Diocesan Trust.

Address: St Edmund's House, Bishop Crispian Way, Portsmouth, Hampshire PO1 3QA

Charity No: 246871.

Depending on the type of gift you are leaving - your Solicitor will help with the wording. For example:

- "I give X% of the residue of my Estate to (the charity name and number) and the proper officer for the time being of charity name shall be a complete discharge to my Executors"
- "I give the sum of £(fixed amount)....."

You can *choose* to leave a gift to either the parish or the Diocese. But in both cases the gift has to be to the Trustees of the Diocesan Trust. This is because the Diocese is a registered charity and so can benefit from the fact that legacies for charitable purposes are exempt from Inheritance Tax.

The Bishop is the senior Trustee of the Diocesan Trust. However, if you wish your gift to benefit the *parish* you can ask your Solicitor to use the particular wording which would enable this. For example:

"I give (either % or fixed sum) to Portsmouth Roman Catholic Diocesan Trustees registered to be applied to both capital and income for the charitable purposes of Portsmouth R.C. Diocese Trust (charity number) and I request that the same shall be used for such purposes within the parish of Our Lady & St Edmund, Abingdon. And I direct that the receipt of one of the Trustees of Portsmouth R.C. Diocesan Trustees registered shall be sufficient discharge to my Executors".