

Leaving a gift in your will

A useful guide



Thank you for considering leaving Julian House a gift in your will. Legacy gifts are important for the future of Julian House - helping us to maintain existing services and develop new projects which will support vulnerable men and women.

What types of gift can you leave?

The most common types of gifts left in wills are:

- **A residuary gift.** The residue (or a proportion of the residue) of an estate after all other gifts, debts and expenses have been paid.
- **A pecuniary gift.** A fixed sum of money.
- **A reversionary gift.** A two-stage gift where assets are first held in a trust to provide some benefit to an individual. This could be a property for them to live in or income generated by investments. Once that individual's need for the property (or trust) ends, the assets then pass to a second beneficiary, such as a charity.
- **A specific gift.** An identifiable asset such as a property, an investment or a piece of jewellery.



If you have any questions about the kind of gift you'd like to leave in your Will, speak to your solicitor.

How do I include Julian House in my will?

We recommend you use a solicitor or professional Will writer to have your Will drafted. The cost is relatively modest and it can help reduce the likelihood of your wishes being challenged after you pass away. You can inform your solicitor or professional Will writer that you would like to leave a gift to Julian House and they will help you to include it in your wishes.

The full legal description that should always be used to describe the charity in a will is: Julian House, 55 New King Street, Bath BA1 2BN (Registered charity No 1183751).

Making a straightforward change to your will

You can easily update your will using a document called a codicil. This makes a simple amendment to your current will. It's completed in the same way as your Will and should be stored with it. We've provided legal wording for your use below, but you may want to check with your solicitor or professional will writer to ensure your wishes will be met.

Making a significant change to your will

If you would like to make significant changes to your will, we recommend that you consult your solicitor or professional will writer and consider having it redrafted.

Wording for your will

When leaving a gift to Julian House, you can use the wording below to draft or amend your will.

Wording if you're leaving Julian House a percentage of your estate (also referred to as a residuary gift):

I give per cent (.....%) of the residue of my real and personal estate to Julian House, 55 New King Street, Bath BA1 2BN (Registered charity No 1183751). and the receipt of a duly authorised officer for the time being of Julian House shall be sufficient discharge for my Executors.

Wording if you're leaving Julian House a fixed sum of money (also referred to as a pecuniary gift):

I give pounds (£.....) to Julian House, 55 New King Street, Bath BA1 2BN (Registered charity No 1183751) and the receipt of a duly authorised officer for the time being of Julian House shall be sufficient discharge for my Executors.

Wording if you're leaving Julian House a particular asset (also referred to as a specific gift):

I give my (include a description of the asset here) to Julian House, 55 New King Street, Bath BA1 2BN (Registered charity No 1183751) and the receipt of a duly authorised officer for the time being of Julian House shall be sufficient discharge for my Executors.