

## Glastonbury Abbey Estate - Making a will.

We recommend that you use a Solicitor. They will ensure that the wording of your will is precise and clear, so that your estate really is dealt with as you desire and will reach those people and organisations that you wish to benefit.

The cost of using a Solicitor may be less than you imagine; but it will of course depend on the length or complexity of your will.

It helps to give your Solicitor as much information as possible. This should include :

The approximate value of your home and any other property.

A list of items of value, that you possess, stating their approximate value.

The approximate value of all your financial assets.

The approximate value of any liabilities you may have.

A list of people, organisations and charities to whom you wish to have benefit from your estate, together with their full names and addresses.

Remember the tax benefits ! All legacies received by Glastonbury Abbey Estate, which is a registered charity ( Number 222448) are free from inheritance tax, so that your family/executors/trustees may have less tax to pay out from the value of your estate .

To include Glastonbury Abbey in your will, here, below, are some suggestions for various types of bequest, with recommended wording that may be added to your will, in some cases, depending on the nature of your bequest:

### Pecuniary bequest.

I give the sum of .....pounds to Glastonbury Abbey Estate, of Abbey Gatehouse, Magdalene Street, Glastonbury, Somerset. BA6 9EL for its charitable purposes. I further direct that the receipt of the Custodian , Treasurer, or other proper officer of the Glastonbury Abbey Estate for the time being shall be a full and sufficient discharge for my Executors or Trustees.

### A Specific bequest.

A particular named item - for example a picture, or piece of carved (Abbey) stone – left as a gift is known as a specific bequest. Wording for this type of bequest should be sought from your solicitor.

### Residuary bequest.

I give the residue of my Estate to Glastonbury Abbey Estate of Abbey Gatehouse, Magdalene Street, Glastonbury, Somerset. BA6 9EL for its charitable purposes. I further direct that the receipt of the Custodian, Treasurer or other proper officer of Glastonbury Abbey Estate for the time being, shall be a full and sufficient discharge for my Executors or Trustees.

### Share of residue.

I give a (state the share in words such as “one half share”) of the residue of my Estate to Glastonbury Abbey Estate of Abbey Gatehouse, Magdalene Street, Glastonbury, Somerset. BA6 9EL for its charitable purposes. I further direct that the receipt of the Custodian, Treasurer or other proper officer of Glastonbury Abbey Estate for the time being shall be a full and sufficient discharge for my Executors or Trustees.

### Suggested Codicil.

“ I (name as in original will) of (address) Declare this is my codicil X to my Will Y”.

I give the sum of .....pounds to Glastonbury Abbey Estate of Abbey Gatehouse, Magdalene Street, Glastonbury, Somerset. BA6 9EL for its charitable purposes. I further direct that the receipt of the Custodian, Treasurer or other proper officer of Glastonbury Abbey Estate for the time being shall be a full and sufficient discharge for my Executors or Trustees.

### Reversionary Request.

This is a gift of property subject to a prior interest. So, if a house is left to someone in their lifetime, on death the house could be gifted to ( say) this charity. The charity has then been given a reversionary interest in the property. Special wording would be needed from your solicitor to accomplish this type of request.

Confidential Pledge.

If you do decide to remember Glastonbury Abbey Estate in your will it would be extremely helpful to our future planning if you could let us know, by completing the pledge below and returning it to The Custodian, Matthew Clements at Glastonbury Abbey, Abbey Gatehouse, Magdalene Street, Glastonbury, Somerset. BA6 9EL.

Please mark your envelope 'Confidential'.

Naturally this pledge is simply a statement of your present intentions and you are under no legal obligation.

> I have already included Glastonbury Abbey Estate in my will.

> I plan to leave a legacy to Glastonbury Abbey Estate.

The legacy I have made/am planning to make is :

> the residue of my estate after I have provided for the people I care about.

> a share of the residue.

> a specific item of value.

> a cash gift.

> I have not yet decided.

It would also be helpful if you could tell us the approximate value of the bequest. £.....

Name.....

Address.....

.....Postcode.....

Returning this form places you under no obligation whatsoever. We understand that what you say is a statement of your present intentions only.

Thank you very much for considering Glastonbury Abbey Estate.