

The James Gibb Stuart Trust

CODICIL FORM

You can make your commitment to Money Reform and economic justice live on, even after you have passed away. Legacies are the primary means by which charities such as ours are able to raise substantial funding.

Remember also that under UK tax law, money, assets and property can be left to a charity, free of Inheritance Tax! This means that not only will you benefit the Cause in which you believe, but you will also benefit your Estate.

If you have not yet left anything to the charity, **The James Gibb Stuart Trust**, then **you must add a Codicil to your Will** – and provide your Will-writer/lawyer with our address and charity number as specified on this form. (A "Codicil" is a supplement to a Will.)

The following Codicil document is legally accurate and is perfectly acceptable in law. It gives several options and you may wish to take advantage of several of them. **You should keep a copy for yourself and attach it to your existing Will. You should also lodge a copy with your lawyer which also needs to be attached to your existing Will.**

If you have not specified a gift in your Will, then our charity will not receive anything!

I (your full name):.....

of (your full address including postcode):.....

declare this to be the (write in appropriate number).....Codicil to the Will I made on the date of

(in words).....

1. I leave the sum of (amount in figures and words) £.....
to The James Gibb Stuart Trust; Registered address: c/o Wylie+Bisset, 168 Bath Street, Glasgow, G2 4TP;
Charity number: SC039525 for its general charitable purposes absolutely.

2. I leave (write in, "the residue of my estate").....
to The James Gibb Stuart Trust; Registered address: c/o Wylie+Bisset, 168 Bath Street, Glasgow, G2 4TP;
Charity number: SC039525 for its general charitable purposes absolutely. (The "residue" is the remainder of the estate after all other bequests have been made and debts cleared. You can gift all, or a percentage, as per number 3 below, of the residue amount left over.)

3. I leave (specific the percentage in figures and words).....%
of the residue of my estate to The James Gibb Stuart Trust; Registered address: c/o Wylie+Bisset, 168 Bath Street, Glasgow, G2 4TP; Charity number: SC039525 for its general charitable purposes absolutely.

4. I leave (write, "all of the remaining value of my estate over the current Inheritance Tax nil rate band")
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to The James Gibb Stuart Trust; Registered address: c/o Wylie+Bisset, 168 Bath Street, Glasgow, G2 4TP;
Charity number: SC039525 for its general charitable purposes absolutely. (The nil rate band is presently £325,000 in 2011-12. This means that everything left in your estate over that figure will be taxed at 40%. However, if you dispose of this amount to charity, then it will **not** be taxed at all.)

Continued overleaf>

5. I leave the following, free of the expense of delivery, (describe the property, assets, objects or articles that you wish to leave. If leaving property, remember to give the full address of the building, or a proper description of the item, so that there can be no confusion. If you need to attach another piece of paper, then please remember to sign, date, and have witnessed this additional piece of paper.)

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to The James Gibb Stuart Trust; Registered address: c/o Wylie+Bisset, 168 Bath Street, Glasgow, G2 4TP; Charity number: SC039525 for its general charitable purposes absolutely. (Remember that property, assets, objects and articles can also be left to charity **free** of Inheritance Tax.)

6. I want (write "donations").....in lieu of flowers at my funeral, to be given and made payable to The James Gibb Stuart Trust; Registered address: c/o Wylie+Bisset, 168 Bath Street, Glasgow, G2 4TP; Charity number: SC039525 for its general charitable purposes absolutely.

Signed:

I confirm that the other aspects covered in my Will and any other Codicils are correct.

Your signature:..... Date:.....

Witnessed:

We confirm that this Codicil was signed by the above named in our joint presence, on the above date, and that we signed below in his/her presence, on the above date.

First Witness Name (print):..... Second Witness Name (print):.....

Address (print):..... Address (print):.....

Occupation (print):..... Occupation (print):.....

Signature:..... Signature:.....