

# The Importance of Legacies for The James Gibb Stuart Trust

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 are able to raise substantial funding.

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 James Gibb Stuart Trust, then **you must contact your lawyer and add a codicil to your Will** – and provide your Will-writer with our address and charity number as below.

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

Once you have made an adjustment to your Will, then please tell us what you have done, by completing this Form and sending it to us. This will allow us to plan for the future with some degree of confidence.

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## LEGACY PLEDGE NOTIFICATION FORM

I have contacted my lawyer and adjusted my Will in order to leave The James Gibb Stuart Trust; Registered address: c/o Wylie+Bisset, 168 Bath Street, Glasgow, G2 4TP; Charity number: SC039525, the following:

**A Pecuniary Bequest** of ..... (this is a gift of a fixed sum of money in your Will. It is not adjusted for inflation and so the value of a pecuniary legacy will decrease over time).

**A Specific Bequest** of ..... (this is a named item left as a gift in your Will – for example, office premises, a house, a library, a car, an expensive item etc).

**A Residuary Bequest** of ..... (this is a gift of the remainder of the estate after all other bequests have been made and debts cleared. It can be all, or part, of the residue amount left over.)

**A Reversionary Bequest** of ..... (this is a gift which is left to a descendant but reverts to The James Gibb Stuart Trust after his or her death).

My name: .....

My address: .....

My telephone: .....

My email: .....

My signature: .....

Date: .....

Please send this form to The James Gibb Stuart Trust, c/o Wylie+Bisset, 168 Bath Street, Glasgow, G2 4TP.

The James Gibb Stuart Trust is a registered charity, number SC039525.

This Legacy Pledge Notification Form is not legally binding.