

# Information for your bank or solicitor



**We recommend that you seek professional advice when making or changing your Will. You may find the following information useful when you visit your bank or solicitor.**

## **Suggested wording**

The wording below can be adapted to suit your particular needs and wishes.

### **Leaving a share of your estate to The Brain Research Trust (a residuary legacy)**

“I give to The Brain Research Trust of 15 Southampton Place, London WC1A 2AJ [all] [a...<sup>2</sup>... percentage or share]<sup>1</sup> of my residuary estate. I declare that the receipt of the Registrar or other authorised officer of The Brain Research Trust shall be a good and sufficient discharge to my Executors.”

### **Leaving a fixed sum of money (a pecuniary legacy)**

“I give to The Brain Research Trust of 15 Southampton Place, London WC1A 2AJ the sum of [in words] pounds (£ [figure])<sup>2</sup>. I wish this legacy to be increased in accordance with the retail price index formula from the date of this my Will.]<sup>1</sup> I declare that the receipt of the Registrar or authorised officer of The Brain Research Trust shall be a good and sufficient discharge to my Executors.”

### **Ensuring spouse/civil partner is taken care of for their lifetime (a reversionary legacy)**

“I give my [ share in my]<sup>1</sup> main residence at my death to my Executors on trust for my wife/husband/civil partner during her/his lifetime and on her/his death to The Brain Research Trust of 15 Southampton Place, London WC1A 2AJ.

“I give [all] [a...<sup>2</sup>...percentage or share] of my residuary estate to my Executors on trust for my wife/husband/civil partner during her/his lifetime and on her/his death to The Brain Research Trust of 15 Southampton Place, London WC1A 2AJ. [It is my wish without creating a binding obligation to UCL that this gift is used for ... (your chosen area)]<sup>1</sup>.”

NOTE: Where property ownership is shared, the status of joint tenancy will mean that the surviving owner automatically inherits the property regardless of any Will or expressed intentions. It is important to ascertain the status of ownership, e.g. tenants in common or joint tenants, as your intentions could be invalidated.

<sup>1</sup> Delete as appropriate

<sup>2</sup> Insert amount in words and figures

## **The Brain Research Trust Charitable Status**

The Brain Research Trust is an Exempt Charity in accordance with Schedule 2 of the Charities Act 1993 (Statutory Instrument 1978, number 453).

The Brain Research Trust is registered in England and Wales no. 263064

### **If you require any further information, please contact:**

**The Brain Research Trust, 15 Southampton Place, London WC1A 2AJ**

Tel: 020 7404 9982

Fax: 020 7404 9983

Email: [info@brt.org.uk](mailto:info@brt.org.uk)

# Confidential legacy pledge form



Sharing this information with us is entirely at your discretion. However, if you do, you will be assisting us greatly to plan more effectively for the future. This pledge is simply a statement of your current intentions and is in no way legally binding.

- I would like to discuss a possible legacy. Please contact me
- I have included a legacy to The Brain Research Trust in my Will and I look forward to discussing how my legacy will benefit The Institute of Neurology.

The approximate value of the gift is

£ \_\_\_\_\_

In some of The Brain Research Trust publications, we record the pledges we receive from people like you who have generously decided to support us in this way. Please tick here if you are happy for us to list you as a supporter

First name(s): \_\_\_\_\_

Surname/Family name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Postcode/Zip code: \_\_\_\_\_

Country: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Data Protection Act 1998- please read carefully

Under the confines of this act, The Brain Research Trust will use the information provided by you for educational, social and charitable purposes only. Your data can be removed from all our mailing lists within one month following receipt of a written request from you. Please contact: The Brain Research Trust, 15 Southampton Place, London WC1A 2AJ