Legacy Pledge Form

Writing a Will is one of the most important things you will ever do. After you have taken care of those you hold dear, we would like you to take a moment and think about including INTERIM in your Will.

Charitable legacies are the foundation for causes like ours and are vital in continuing our work, so thank you for considering leaving a gift in your Will to support our work.

We recognise that your bequest intentions are a personal matter and you may wish them to remain confidential.

However, if you are willing to complete this Pledge Form it will help us for planning

Purposes:

**My Pledge to INTERIM**

**(A Charity registered in England and Wales No. 1165114)**

Full Name: …………………………………………

Address:

Telephone number: …………………………………………

Email: …………………………………………

Solicitor/Executor name: …………………………………………

Solicitor’s/ Executor’s contact details:

**Please select one of the following options:**

I have already included INTERIM in my Will/I intend to remember INTERIM in my Will\*(delete as appropriate) with:

• The residue of my estate 

• A proportion of the residue of my estate \_\_\_\_% 

• A fixed sum of £\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 

• Other 

Please give details:

Please use this space if you would like to tell us anything about yourself, your gift, and the reason you have chosen to support INTERIM’s work in this way.

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

**Please note**: We strongly advise that you seek professional advice from your solicitor or a legally qualified Will Writer.

**Please show this form to your Solicitor and then return it to:**

INTERIM 48, Narcissus Road, West Hampstead NW6 1TH

**Legacy Frequently Asked Questions**

**What are the different ways of leaving a gift to charity in my Will?**

• A pecuniary or monetary legacy allows you to leave a specific sum of money to INTERIM. It is possible to link this sum to inflation so the gift does not depreciate over the years. Please consult your legal advisor.

• A residuary legacy allows you to leave all or part of the remainder of your estate to INTERIM, after other legacies and charges have been met.

• A reversionary legacy leaves your assets to a named beneficiary (for example, your spouse or other dependent) for their lifetime, with the whole or a portion reverting to INTERIM on their death.

• A specific or non-monetary legacy allows you to leave a specific possession (e.g. shares, property, stocks, pictures or furniture) to INTERIM to be retained or sold to

provide funds for our work.

• A conditional legacy provides for the eventuality that if none of your dependents survives you, your estate will be left to other named beneficiaries including, perhaps INTERIM.

**What should I include in my Will?**

INTERIM would be delighted to receive any gift you choose to make in your Will. We suggest you consult your solicitor, who will be able to advise you on the next steps. You should also obtain appropriate taxation advice on any proposed gifts of property

under your Will. Please note that a legacy should refer to INTERIM.

Here is some suggested wording, to discuss with your legal and taxation advisors:

“I, [INSERT FULL NAME], give to INTERIM, United Kingdom (a charity registered in England and Wales No. 1165114) the residue of my estate

- a proportion of the residue of my estate: \_\_\_\_%

- the sum of £\_\_\_\_\_\_

- other (give details below)

[free of tax] for the general purposes of INTERIM’s work and I declare the receipt of the Chair of Trustees or other authorised Officer for the time being of INTERIM shall be a good and sufficient discharge to my Executors.”

**How will INTERIM use my personal information?**

INTERIM collects the personal information you provide to us in this form so we can record your bequest intentions and keep you updated on our work. Your details will be treated in the strictest confidence and we will never share your personal details with any other organisation without your permission.

If you would like to gain access to your personal information or require further details please do not hesitate to contact us.

In order for your legacy gift to INTERIM to take effect you must make a Will or make changes to your existing Will, known as a Codicil.

This Pledge Form is not legally binding; it is simply a statement of your present intentions. You are free to change your Will at any time. Any information you choose to share with us about your legacy will be treated in the strictest confidence.

**Thank you for supporting INTERIM’s work in this way. Please show this form to your solicitor and return it to INTERIM.**

If you have any queries about our work, please telephone INTERIM on 07778188787 and leave a message and we will return your call, or email:

enquiries@weareinterim.co.uk