



Suggested Wording for Your Solicitor

We of course advise you to seek professional advice when creating or updating your Will. You should consult your solicitor to ensure that whatever provision you wish to make is written appropriately so that your wishes can be carried out. Sample wording to assist you in this process is shown below.

The whole or part of your estate (a residuary gift)

This is the gift of all or part of the value of your estate, after debts and other gifts and liabilities have been met. This has the advantage of automatically keeping pace with inflation.

Whole of the estate

“Subject to the payment of my debts funeral and testamentary expenses I GIVE the residue of my estate to THE DRAGON SCHOOL TRUST LIMITED (“the Dragon School”) Bardwell Road Oxford OX2 6SS registered charity number 309676 to be applied for its general charitable purposes and I further declare that the receipt of the Bursar for the time being of the Dragon School shall be a sufficient discharge to my Executor[s]”

Part of the estate

“Subject to the payment of my debts funeral and testamentary expenses I GIVE the residue of my estate as follows:-

- (A) (percentage/fraction) to THE DRAGON SCHOOL TRUST LIMITED (“the Dragon School”) Bardwell Road Oxford OX2 6SS registered charity number 309676 to be applied for its general charitable purposes and I further declare that the receipt of the Bursar for the time being of the Dragon School shall be a sufficient discharge to my Executor[s] and subject thereto in accordance with sub clause B below
- (B) (percentage/fraction) to (preferred charity or individual) and subject thereto in accordance with sub clause A above”

Please note - If your estate is subject to inheritance tax you should speak to your solicitor about the complicated taxation consequences of leaving part of your estate to a charity and part to an individual or non charitable organisation.

A fixed amount of money (a pecuniary legacy)

You can choose to leave a fixed sum of money.

Suggested wording:

“I GIVE £_____ to THE DRAGON SCHOOL TRUST LIMITED (“ the Dragon School”) Bardwell Road Oxford OX2 6SS registered charity number 309676 to be applied for its general charitable purposes and I further declare that the receipt of the Bursar for the time being of the Dragon School shall be a sufficient discharge to my Executor[s]”

A specific item (a specific legacy)

This is the gift of something valuable such as property, a piece of jewellery or stocks and shares. The form of wording is the same as for a pecuniary gift, except that the gift is specified instead of a cash sum.

Suggested Wording:

“I GIVE (description of what you chose to leave) to THE DRAGON SCHOOL TRUST LIMITED (“the Dragon School”) Bardwell Road Oxford OX2 6SS registered charity number 309676 to be applied for its general charitable purposes and I further declare that the receipt of the Bursar for the time being of Dragon School shall be a sufficient discharge to my Executor[s]”

Please note – If you give something specific away in your Will and you do not own it at the date of your death the gift will fail and the charity will receive nothing.

December 2011

The Dragon School Trust Ltd is registered as a charity, no 309676, and as a limited company, no 524331.