

Sample Will Wording

Please seek the advice of your solicitor or other professional adviser before including any sample wording in your will, and ensure any will or codicil entered into is properly executed.

Sample wording for an unrestricted legacy of a percentage of the testator's residuary estate:

I give.....% of the residue of my estate (before the deduction of inheritance tax, if any is payable) to the University of Lancaster, University House, Lancaster, LA1 4YW (HMRC exempt charity number XN4960) as an unrestricted legacy. It is my wish that it shall be applied for the benefit of said University wherever the University considers the funds could be best used at the time of their receipt. On realisation of the bequest a receipt from the University Secretary or other authorised officer shall be sufficient discharge for my Executors.

Sample wording for an unrestricted gift of a specific sum of money or specific item:

I give [the sum of £.....] [*insert details of specific item*] free of tax to the University of Lancaster, University House, Lancaster, LA1 4YW (HMRC exempt charity number XN4960) as an unrestricted legacy. It is my wish that it shall be applied for the benefit of said University wherever the University considers the funds could be best used at the time of their receipt. On realisation of the bequest a receipt from the University Secretary or other authorised officer shall be sufficient discharge for my Executors.

Sample wording for a legacy of a fixed sum of money:

The legacy referred to in clause..... shall be index-linked, so that the actual amount given shall be the figure which bears the same proportion to the sum stated as the index figure in the Index of Retail Prices (the "**Index**") for the month in which my death occurs bears to the index figure in the Index for the month in which this will is executed.

Sample wording for a restricted legacy of a percentage of the testator's residuary estate:

I give..... % of the residue of my estate (before the deduction of inheritance tax, if any is payable) to the University of Lancaster, University House, Lancaster, LA1 4YW (HMRC exempt charity number XN4960) to support [*insert specific project or purpose of legacy*]. If at my death this area is fully funded, or if it is no longer an area in which the University is actively involved, I wish that my gift is used to support activities that are as close as possible to my original intentions at the discretion of the University of Lancaster. On realisation of the bequest a receipt from the University Secretary or other authorised officer shall be sufficient discharge for my Executors.

Sample wording for a restricted gift of a specific sum of money or specific item:

I give [the sum of £.....] [*insert details of specific item*] free of tax to the University of Lancaster, University House, Lancaster, LA1 4YW (HMRC exempt charity number XN4960) to support [*insert specific project or purpose of legacy*]. If at my death this area is fully funded, or if it is no longer an area in which the University is actively involved, I wish that my gift is used to support activities that are as close as possible to my original intentions at the discretion of the University of Lancaster. On realisation of the bequest a receipt from the University Secretary or other authorised officer shall be sufficient discharge for my Executors.

As a higher education institution, Lancaster University is an exempt charity and doesn't need to be registered with the Charity Commission. Our HMRC reference number is:

XN4960