



This form is for your information only and provides suggested wording to include specific types of legacy gifts in your will. **It is important that you contact your solicitor to get qualified legal advice about leaving a legacy to the Malvernian Society in your will.**

Residuary bequest – a gift of all or a percentage of your estate after allowing for expenses, duties and other charges. The advantage of a residuary bequest is that it maintains its real value, regardless of any future inflation.

Wording: *“I give to the Malvernian Society Ltd. (Address: Malvern College, College Road, Malvern, Worcestershire, WR14 3DF; Registered Charity Number 527573) all [or a percentage] of my residuary estate to be applied to the general purposes of the said Charity and I declare that the receipt of the Secretary or other authorised officer for the time being of the Malvernian Society shall be good and sufficient discharge to my Executors.”*

Pecuniary and specific bequest – a gift of a fixed sum of money. Because of inflation, you may wish to consider that the value of the gift may reduce over the years, which means that the amount of the gift may need updating periodically in order to maintain its value in today’s terms.

Wording: *“I give to the Malvernian Society Ltd. (Address: Malvern College, College Road, Malvern, Worcestershire, WR14 3DF; Registered Charity Number 527573) the sum of £ [in words] or the Index Linked* sum of £ [in words] free from all taxes and duties, to be applied to the general purposes of the said Charity and I declare that the receipt of the Secretary or other authorised officer for the time being of the Malvernian Society shall be good and sufficient discharge to my Executors.”*

* The phrase Index Linked sum means:

The amount specified (the Original Amount) as multiplied by the index figure in the Retail Price Index for the month immediately before my death and then divided by the index figure for the month in which this codicil is executed. If the Retail Price Index is no longer in existence at my death or the basis of its computation has been altered, my trustees shall compute the Index Linked sum in accordance with such formula as seems in their absolute discretion to be fair and reasonable so as to enable the Original Amount to be increased in accordance with inflation.

Wording to express a testator’s specific wish

Where possible, we prefer your legacy to be applicable to the general purposes of the Malvernian Society, as this allows us to apply funds to the area of greatest need at Malvern College. If however you wish your legacy to be directed towards a specific purpose, you may like to use the following wording. Please bear in mind that any purpose that is too specific may make it difficult to use your legacy.

Wording: *“I express the wish, but without creating any legally binding obligation, that the said Charity use the said bequest for [intended use].”*

Please note that no information in this document is intended to constitute any legal advice by the Malvernian Society or Malvern College.