

# YOUR CODICIL FORM

This is a suggested sample codicil for adding a gift to Plan in your will. However, you should consider seeking advice from a solicitor to finalise the codicil and ensure it is legally correct and works in the way you want it to. In some circumstances it may be better to create a new will – your solicitor can advise you. If you're unsure about anything, please do not hesitate to get in touch. Thank you so much for your interest in leaving a gift to help vulnerable children.

I declare this to be a (first/second/etc) codicil to my will dated \_\_\_\_\_ (date)

[as amended by my first codicil dated \_\_\_\_\_ (date)]

[and my second codicil dated \_\_\_\_\_ (date)]

[(add similar text for any further codicils)].

In addition to any legacies given in my will I give (details of gift – see overleaf for different types of gifts you can make to Plan – your solicitor can advise further)

To Plan International UK, registered charity number 276035, whose registered office is situated at Finsgate, 5-7 Cranwood Street, London, EC1V 9LH, UK to be applied for the general purposes of that charity and I declare that an official receipt from that charity shall be sufficient discharge for the same. In applying this legacy I request, without imposing any binding obligation, that Plan shall, if practicable, have regard to the contents of any Notes of Wishes of mine found with my will.

I confirm the rest of my will.

**Signed:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## WITNESSED BY

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

Name: \_\_\_\_\_ Name: \_\_\_\_\_

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

Occupation: \_\_\_\_\_ Occupation: \_\_\_\_\_

This Codicil was signed by the persons above mentioned, in our presence and witnessed by us in the presence of him/her and of each other.

(Two witnesses are needed in England, Wales and Northern Ireland, one witness in Scotland)

# SUGGESTED WORDING

On this page you will find some information about the main types of gift you can leave to Plan International UK in your will and some suggested wording to show your solicitor for each type of gift. If you're unsure about anything, please don't hesitate to get in touch.

Thank you so much for your interest in leaving a gift to help vulnerable children.

## Different types of gifts

The main types of gifts to charities in wills are:

- **Residuary gift** – a percentage share of your estate after payment of specific and pecuniary legacies (see below) and any debts due. This type of gift keeps pace with inflation.
- **Pecuniary legacy** – a fixed sum of money. This type of gift does not keep pace with inflation unless you review your will regularly or your will links the gift with inflation.
- **Specific legacy** – a gift of specific items.

## Residuary Legacy

"I give (write in words) % of my estate to Plan International UK, Finsgate, 5-7 Cranwood Street, London, EC1V 9LH, registered charity number 276035 to be applied for the general purposes of that charity and I declare that an official receipt from the treasurer or other duly authorised officer of that charity shall be a sufficient discharge to my executors."

## Pecuniary Legacy

"I give the sum of £ (write in words) to Plan International UK, Finsgate, 5-7 Cranwood Street, London, EC1V 9LH, registered charity number 276035 to be applied for the general purposes of that charity and I declare that an official receipt from the treasurer or other duly authorised officer of that charity shall be a sufficient discharge to my executors."

## Specific Legacy

"I give (insert description of items) to Plan International UK, Finsgate, 5-7 Cranwood Street, London, EC1V 9LH, registered charity number 276035 to be applied for the general purposes of that charity and I declare that an official receipt from the treasurer or other duly authorised officer of that charity shall be a sufficient discharge to my executors."

## Restricted and unrestricted gifts

Unrestricted gifts are those which allow Plan to use the funds for any purpose. These are particularly valuable to us because they mean we can apply the money where the need is greatest. Our suggested wording above would allow your gift to be used in this way.

Restricted gifts require the money to be used for particular areas of Plan's work. If you would like to help a particular project, country or region, then please get in touch to discuss this on 020 3217 0215. It may be possible to use a "letter of wishes", which will enable Plan to respect your wishes whilst retaining some flexibility to use the money elsewhere if, for example, the project has been completed.

If you'd like to help a particular project, country or region then please get in touch to discuss this on **020 3217 0215** or at [legacies@plan-uk.org](mailto:legacies@plan-uk.org)