

# LEGACIES

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## **Short form legacy**

I give

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(please specify cash sum or property) free of tax to the trustees for the time being of the **Old Dovorian Trust** (Trust dated 20<sup>th</sup> May 1980, registered charity number 281072) for the general charitable purposes thereof.

## **Long form legacy**

I give

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(please specify cash sum or property) free of tax to the trustees for the time being of the **Old Dovorian Trust** (Trust dated 20<sup>th</sup> May 1980, registered charity number 281072) for the

purpose of \_\_\_\_\_

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(describe particular purpose or object)

to the extent that and for as long as the said purpose shall be charitable according to English law. I also direct that if the trustees for the time being of the Old Dovorian Trust shall in their absolute discretion consider the said purpose fulfilled, or no longer capable of being met for any reason, they shall then hold the balance of the capital and income of this legacy upon the Trust, with and subject to the powers and provisions in the Declaration of Trust, for such other charitable objects as may for the time being apply thereto. I further direct that the receipt of the trustees for the time being of the Old Dovorian Trust shall be a complete discharge to (my executors/trustees) who shall not be responsible for the further application of this legacy.

## **Notes.**

1. Legacies for charity are exempt from inheritance tax.
2. If legacies are restricted to particular purposes, there is a risk that those purposes might not always be exclusively charitable under English law, or that the funds contributed from all sources might exceed the amount required to meet those purposes. It helps if all contributions, whether by covenant or legacy, are unrestricted (the Short Form, above) but particular purposes may be specified (Long Form), in which case legal advice should be sought. If in doubt, please contact one of the trustees.