

Monte San Martino Trust
Aide Memoire regarding Completion of Codicil

If you have already made a Will and would like to add a bequest to the Monte San Martino Trust (registered charity no.1113897), you can use this codicil form. The codicil is suitable only for a cash bequest. Should you wish to make some other form of bequest (for example, leaving a percentage of your estate to the Trust), you should seek the advice of your solicitor.

Please note that any codicil must be signed and witnessed in the same way as a Will – that is, you must have two adult witnesses who are not related to you or to anyone who benefits under your will. They must both sign in the presence of you and of each other.

Once completed, the codicil should be stored with the original copy of your Will. We suggest that you check any alterations to your Will with your solicitor.

Please note that you must not affix anything to the codicil, by way of a paperclip or a staple, as to do so may prevent your executors being able to obtain probate of your codicil.

We can assure you that all bequests, no matter how small, will be very gratefully received!

If you have any queries, please do not hesitate to contact me.

Nicholas Gent
Trustee and Treasurer
Tel: 07764 357466 (mobile)
0117 9291919 (office)

Email: nick.gent@rathbones.com

Monte San Martino Trust –Suggested Form of Codicil

I,(full name)

of

.....(full address)

declare this to be the (first, second, etc) Codicil to my last Will which is dated

the day of19..... or 20.....

- 1. I give free of tax to the Monte San Martin Trust (registered charity number 1113897) the sum of £..... to be used for the general advancement of the Monte San Martino Trust.

(there is an option here of putting in an index-linking reference – please add the wording in the note below if applicable).*

- 2. In all other respects I confirm my said Will.

As witness my hand this day of 20

SIGNED by the Testator/)
Testatrix)
in our presence and attested)
by us in the presence of)
him/her and of each other)

Witness Signature:
.....

Witness Signature:
.....

Witness Name:

Witness Name:

Address:

Address:

Occupation:

Occupation:

*Additional wording to add for index-linking:

The amount of the legacy specified in this clause shall be regarded as a provisional amount only and the amount payable shall be that provisional amount or, if greater, that provisional amount index-linked to the retail prices index from the date of this Will to the date of my death. Provided that, if the retail prices index ceases to exist, such legacies shall be index-linked to such index as my Trustees shall in their absolute discretion select.

Monte San Martino Trust
Pledge Form

If you have included, or intend to include, the Monte San Martino Trust in your Will, it would help us when reviewing our plans to have an indication of your support. We would be most grateful if you would complete and return this form:

Name:

Address:

Daytime Telephone No:

This is to notify the Monte San Martino Trust that:

- I intend to make provision in my Will
- I have already made provision in my Will

If you are happy to do so, please give us an indication of the likely value of your gift. This will assist us when doing our planning for the future of the Trust:

- Please tick if you wish your legacy to remain anonymous

