



Gifts in Wills

Suggested wording for your Solicitor





A Residuary Gift

All or part of your estate

Whole of the estate suggested wording:

“Subject to the payment of my debts funeral and testamentary expenses I GIVE the residue of my estate to THE DRAGON SCHOOL TRUST LIMITED (“the Dragon School”) Bardwell Road Oxford OX2 6SS registered charity number 309676 to be applied for its general charitable purposes and I further declare that the receipt of the Chief Operating Officer for the time being of the Dragon School shall be a sufficient discharge to my Executor[s]”

Part of the estate suggested wording:

“Subject to the payment of my debts funeral and testamentary expenses I GIVE the residue of my estate as follows:”

(A) (percentage/fraction) to THE DRAGON SCHOOL TRUST LIMITED (“the Dragon School”) Bardwell Road Oxford OX2 6SS registered charity number 309676 to be applied for its general charitable purposes and I further declare that the receipt of the Chief Operating Officer for the time being of the Dragon School shall be a sufficient discharge to my Executor[s] and subject thereto in accordance with sub clause B below

(B) (percentage/fraction) to (preferred charity or individual) and subject thereto in accordance with sub clause A above” Please note - If your estate is subject to inheritance tax you should speak to your solicitor about the complicated taxation consequences of leaving part of your estate to a charity and part to an individual or non-charitable organisation.

A Pecuniary Gift

A fixed amount of money

Suggested wording:

“I GIVE £_____ to THE DRAGON SCHOOL TRUST LIMITED (“ the Dragon School”) Bardwell Road Oxford OX2 6SS registered charity number 309676 to be applied for its general charitable purposes and I further declare that the receipt of the Chief Operating Officer for the time being of the Dragon School shall be a sufficient discharge to my Executor[s]”



A Specific Gift

A specific item such as property, jewellery or stocks and shares

Suggested Wording:

“I GIVE (description of what you chose to leave) to THE DRAGON SCHOOL TRUST LIMITED (“the Dragon School”) Bardwell Road Oxford OX2 6SS registered charity number 309676 to be applied for its general charitable purposes and I further declare that the receipt of the Chief Operating Officer for the time being of Dragon School shall be a sufficient discharge to my Executor[s]”

Please note – If you give something specific away in your Will and you do not own it at the date of your death the gift will fail and the charity will receive nothing



Gifts through a Codicil

If you already have a satisfactory Will but now decide that you wish to include a gift to the Dragon School, all that is required is to add a codicil to your existing Will. After being witnessed by two people, the form should be sent to your solicitor to be kept with your Will.

I [full name]

Of [full address] _____

declare this to be a [1st] / [2nd] codicil to my Will dated ___/___/_____

In addition to any legacies given in my said Will, I give to THE DRAGON SCHOOL TRUST LIMITED ("the Dragon School") Bardwell Road Oxford OX2 6SS registered charity number 309676

[the sum of] £ _____ And/Or [a specific item] _____

To be applied for its general charitable purposes and I further declare that the receipt of the Chief Operating Officer for the time being of the Dragon School shall be a sufficient discharge to my Executor[s] In all other respects

I confirm my said Will [and any other codicils thereto]

Signed _____ Date _____

Witnessed by:

Name

Address

Occupation

Date

Name

Address

Occupation

Date

Signature _____

Signature _____

Please note - We would always advise that you seek specialist legal advice when making a Will or adding a Codicil to an existing Will