

CODICIL FORM

UPDATING YOUR EXISTING WILL



You can use this form if you would like to update your existing Will to include a gift specifically to BMS World Mission. This form should only be used to include either a cash (pecuniary) gift or a gift of a specific asset (eg: jewellery) to BMS World Mission.

GUIDANCE NOTES – PLEASE READ

If you have any questions about writing a Codicil or updating your Will, you should seek advice from a qualified legal professional. We recommend that you consult a legal professional if you would like to make substantial amendments to an existing Will. For example, should you wish to include a gift of residue (percentage gift) to BMS, or include a specific gift of a property. In those circumstances you will need further advice of the impact of such a generous gift on your existing Will and it may be advisable in those circumstances that you make a new Will. If this is required, did you know that you can write your Will for free using our free Will scheme? This can be done in as little as 15 minutes, online or over the phone, thanks to our trusted partnership with Octopus Legacy. To get started visit www.bmswm.org/octopus

If your estate is of such value that Inheritance Tax may be payable it would be advisable to consult a qualified legal professional regarding any changes to your Will. A reduced rate of Inheritance Tax may be payable on some assets if you leave 10% or more of the 'net value' to charity in your Will. It's not necessarily a simple 10% calculation however and therefore should you wish to take advantage of this, please consult a qualified legal professional for advice.

The following Codicil writing guidance is based on the laws of England and Wales. Legal requirements may differ in the other nations within the UK and you should take legal advice as necessary regarding this.

- You can add more than one Codicil to an existing Will. Please indicate the version number when completing the form, for example 'first Codicil' or 'third Codicil'.
- Do not write directly on your original Will as it may invalidate it and cause significant issues when dealing with the administration of your estate.
- The completed Codicil form needs to be kept in a safe place with your original Will (but not stapled or paper clipped to it). Take a copy of your Codicil and send the original to your solicitor, or whoever is safeguarding your existing Will.
- This Codicil form needs to be signed by you in the presence of two independent adult (over 18yrs) witnesses. The following people cannot sign and witness your Codicil:
 - An executor or trustee of your Will
 - An executor's or trustee's spouse or civil partner
 - A beneficiary of your Will or Codicil
 - A beneficiary's spouse or civil partner
- If you have further Wills in jurisdictions outside of England and Wales, please consult with a qualified legal professional before making any changes to your Will.

CODICIL FORM



I, full name _____

of (address) _____

declare this to be a (first/second/third) Codicil to my Will dated _____

I give free of inheritance tax to BMS World Mission, registered charity in England and Wales, Charity number:1174364 of PO Box 49, 129 Broadway, Didcot, Oxfordshire, OX11 8XA:

a cash sum of £ _____ (pecuniary gift)

a specific gift of _____ (specific gift)

absolutely to be used for its general charitable purpose and I direct that the receipt of the treasurer or duly authorised officer shall be a sufficient discharge to my executors.

In all other respects I confirm my Will and any previous Codicils thereto.

Testator's signature _____

Date _____

Signed by the person mentioned above, in our presence, and witnessed by us in the presence of him/her and of each other.

FIRST WITNESS

SECOND WITNESS

Signature _____

Signature _____

Name _____

Name _____

Address _____

Address _____

Postcode _____

Postcode _____

Occupation _____

Occupation _____

Note: A witness cannot be anyone who is your executor, trustee or a beneficiary of your Will or any Codicil. A witness cannot be anyone married to, or in a civil partnership with, an executor, trustee or a beneficiary.