

## DIOCESE OF ARUNDEL & BRIGHTON

### BEQUESTS

#### NOTE ON HOW TO MAKE BEQUESTS

Legacies for charitable purposes are exempt from inheritance tax. The Diocese is a registered charity and so can benefit from bequests. Care must be taken over the wording; home-made wills can lead to court action and the frustration of the testator's intentions. Your legal adviser should incorporate the wording(s) below in your Will.

The Bishop is the senior Trustee of the Arundel and Brighton Diocesan Trust. The gifts in bequests A, B and C are charitable and qualify for exemption from Inheritance Tax.

#### A. BEQUESTS TO THE DIOCESE

I give to the Trustees of the Arundel and Brighton Diocesan Trust of Bishop's House The Upper Drive Hove East Sussex BN3 6NB being registered charity Number 252878 [the sum of £..... free of tax] [..... of my residuary estate] and the receipt of the Financial Secretary or other officer of the Trust shall be a full discharge to my executors in respect of the same.

#### B. BEQUEST FOR A PARISH/SPECIAL PURPOSE

I give to the Trustees of the Arundel and Brighton Diocesan Trust of Bishop's House The Upper Drive Hove East Sussex BN3 6NB being registered charity Number 252878 [the sum of £..... free of tax] [..... of my residuary estate] on trust for such charitable purposes in connection with [..... see note 1..... ]

1.

in the said Diocese as the Trustees shall in their absolute discretion think fit and the receipt of the Financial Secretary or other officer of the Trust shall be a full discharge to my executors in respect of the same.

#### C. BEQUEST FOR A FOUNDATION MASS (see note 2)

I give to the Trustees of the Arundel and Brighton Diocesan Trust of Bishop's House The Upper Drive Hove East Sussex BN3 6NB being registered charity Number 252878 the sum of £ ..... free of tax for the foundation of a mass to be offered at the Roman Catholic Church at ..... annually for 25 years for the intention of ..... and the receipt of the Financial Secretary or other officer of the Trust shall be a full discharge to my executors in respect of the same.

#### D. BEQUEST FOR MASSES

I give the sum of £..... free of tax to the priest in charge of the Roman Catholic Church at ..... to be applied to the offering of masses for the intention of ..... and I declare that the receipt of the Priest in charge of the said Church at the time of the payment of this bequest shall be a full discharge to my executors in respect of the same.

#### Notes:

1. Insert name of parish and town, or one of the Diocesan special funds, such as Retired Priests, Sick Priests, Training of Priests, etc.
2. The minimum sum for a Foundation Mass is £300.

2.

## Remembering your Parish or Diocese in your Will ~



~ helps the Church of the future



Jesus wants us to pass our faith,  
love and his teachings to his children  
~ young and old ~

The Arundel and Brighton Diocesan Trust  
is a Registered Charity No. 252878

## Why give to my Parish?

**Your parish** relies on the generosity of its parishioners for support and finance to cover the day to day running of the parish. However any repairs or enhancements can be very costly.

One way of helping your parish in the future is to remember it in your Will.

Behind this initiative is our knowledge of the difference that God's love makes to a broken world. We want to encourage everyone in **our** parish to do their utmost to make sure that God's love is communicated to those about us; whether that is through what we do and give now, or through what we can give for the future.

Legacy giving is about investing in God's work through **our** parish in the future – through your Will.

Gifts left in your Will do not have to be large, we appreciate that you have family and other obligations. We would be very grateful for even a small donation. We respectfully ask you to consider giving whatever you can in your Will.

We also realise that your circumstances may change .

## Why give to the Diocese?

The Bishop leads our Diocese and is assisted by Diocesan Trustees. The Diocese is the central body supporting our priests, parishes and schools. You can help the Bishop with a general bequest to the Diocese or one for the training of priests or caring for sick or retired priests.

### What to do?

To leave a gift to the church, you need to make a Will or you can amend an existing Will. You need to seek legal advice, usually from a solicitor. The cost will vary depending on how complicated your estate is.

You can leave a specific sum of money or something of value (such as property or shares). Equally you can leave all or part (a percentage) of the value of your estate, or the residual balance of your estate once all other beneficiaries are paid.

A note on Bequests is on the reverse of this leaflet to assist with the wording of a Will.

For further help or advice please contact the Diocesan Financial Secretary.

Tel: 01273 859705  
Email: [finance@dabnet.org](mailto:finance@dabnet.org)

**Thank you for taking the time to read this leaflet**

**Any assistance you can give your Parish and Diocese is always very much appreciated**



**Remember  
~ Without a Will ~  
your estate could pass to the  
Government!**