

Will Wording: Guidance for solicitors in Scotland

If your client would like to include a gift in their will to Shelter Scotland for its **general charitable purposes**, please use the following wording:

A SHARE OF THEIR ESTATE

I give to Shelter Scotland of The Tun, 4 Jackson's Entry, Edinburgh, EH8 8PJ, registered charity number in Scotland SC002327 all/ _____ % of the residue* of my estate absolutely for its general charitable purposes and I declare that the receipt of the Finance Director or other proper officer at Shelter Scotland for the time being shall be a sufficient discharge to my executor(s).

*please delete as appropriate

A CASH GIFT

I give to Shelter Scotland of The Tun, 4 Jackson's Entry, Edinburgh, EH8 8PJ, registered charity number in Scotland SC002327 the sum of £ _____ (please specify words and figures) free of tax for its general charitable purposes and I declare that the receipt of the Finance Director or other proper officer at Shelter Scotland for the time being shall be a sufficient discharge to my executor(s).

THEIR HOME

I give to Shelter Scotland of The Tun, 4 Jackson's Entry, Edinburgh, EH8 8PJ, registered charity number in Scotland SC002327 the net sale proceeds of my property: [insert address and postcode] ("my property") free of tax for its general charitable purposes and I declare that the receipt of the Finance Director or other proper officer at Shelter Scotland for the time being shall be a sufficient discharge to my executor(s). In the event that my property should have been sold in my lifetime (or a sale agreed but not completed prior to the date of my death), then I give a sum representing the net sale proceeds of my property to Shelter Scotland in lieu of the above gift.

If your client would like to include a gift in their will to Shelter Scotland for **an area of our work**, please use the following wording:

A SHARE OF THEIR ESTATE

I give to Shelter Scotland of The Tun, 4 Jackson's Entry, Edinburgh, EH8 8PJ, registered charity number in Scotland SC002327 all/ _____ % of the residue* of my estate with the wish, but without imposing a binding obligation, that the gift is used for _____ (please specify area of our work), and I declare that the receipt of the Finance Director or other proper officer at Shelter Scotland for the time being shall be a sufficient discharge to my executor(s).

*please delete as appropriate

A CASH GIFT

I give to Shelter Scotland of The Tun, 4 Jackson's Entry, Edinburgh, EH8 8PJ, registered charity number in Scotland SC002327 the sum of £ _____ (please specify words and figures) free of tax, with the wish, but without imposing a binding obligation, that the gift is used for _____ (please specify area of our work), and I declare that the receipt of the Finance Director or other proper officer at Shelter Scotland for the time being shall be a sufficient discharge to my executor(s).

THEIR HOME

I give to Shelter Scotland of The Tun, 4 Jackson's Entry, Edinburgh, EH8 8PJ, registered charity number in Scotland SC002327 the net sale proceeds of my property: [insert address and postcode] ("my property") free of tax with the wish, but without imposing a binding obligation, that the gift is used for (please specify area of our work), and I declare that the receipt of the Finance Director or other proper officer at Shelter Scotland for the time being shall be a sufficient discharge to my executor(s). In the event that my property should have been sold in my lifetime (or a sale agreed but not completed prior to the date of my death), then I give a sum representing the net sale proceeds of my property to Shelter Scotland in lieu of the above gift.

HOME IS EVERYTHING

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