



## Sample Will Wording

**Please seek the advice of your solicitor or other professional adviser before including any sample wording in your will, and ensure any will or codicil entered into is properly executed.**

### **Unrestricted Gifts – Preferred**

*Sample wording for an **unrestricted** legacy of a percentage of the testator's residuary estate:*

I give \_\_\_\_\_ % of the residue of my estate (before the deduction of inheritance tax, if any is payable) to the Institute of Historical Research Trust, Senate House, Malet Street, London, WC1E 7HU (registered charity number 1077592) as an unrestricted legacy. It is my wish that it shall be applied for the benefit of said Institute of Historical Research wherever the Institute of Historical Research considers the funds could be best used at the time of receipt. On realisation of the bequest a receipt from the Registrar or other authorised officer shall be sufficient discharge for my Executors.

*Sample wording for an **unrestricted** gift of a specific sum of money or specific item:*

I give [the sum of £ \_\_\_\_\_] [*details of specific item*] free of tax to the Institute of Historical Research Trust, Senate House, Malet Street, London, WC1E 7HU (registered charity number 1077592) as an unrestricted legacy. It is my wish that it shall be applied for the benefit of said Institute of Historical Research wherever the Institute of Historical Research considers the funds could be best used at the time of their receipt. On realisation of the bequest a receipt from the Registrar or other authorised officer shall be sufficient discharge for my Executors.

*In the case of a legacy of a fixed sum of money, you may wish to include the following wording:*

The legacy referred to in clause \_\_\_\_\_ shall be index-linked, so that the actual amount given shall be the figure which bears the same proportion to the sum stated as the index figure in the Index of Retail Prices (the "**Index**") for the month in which my death occurs bears to the index figure in the Index for the month in which this will is executed.



### Restricted Gifts

*Sample wording for a **restricted** legacy of a percentage of the testator's residuary estate:*

I give \_\_\_\_\_ % of the residue of my estate (before the deduction of inheritance tax, if any is payable) to the Institute of Historical Research Trust, Senate House, Malet Street, London, WC1E 7HU (registered charity number 1077592) to support [*specific project or purpose of legacy*]. If at my death this area is fully funded, or if it is no longer an area in which the Institute of Historical Research is actively involved, I wish that my gift is used to support activities that are as close as possible to my original intentions at the discretion of the Institute of Historical Research. On realisation of the bequest a receipt from the Registrar or other authorised officer shall be sufficient discharge for my Executors.

*Sample wording for **restricted** gift of a specific sum of money or specific item:*

I give [the sum of £ \_\_\_\_\_] [*details of specific item*] free of tax to the Institute of Historical Research Trust, Senate House, Malet Street, London, WC1E 7HU (registered charity number 1077592) to support [*specific project or purpose of legacy*]. If at my death this area is fully funded, or if it is no longer an area in which the Institute of Historical Research is actively involved, I wish that my gift is used to support activities that are as close as possible to my original intentions at the discretion of the Institute of Historical Research. On realisation of the bequest a receipt from the Registrar or other authorised officer shall be sufficient discharge for my Executors.

*In the case of a legacy of a fixed sum of money, you may wish to include the following wording:*

The legacy referred to in clause \_\_\_\_\_ shall be index-linked, so that the actual amount given shall be the figure which bears the same proportion to the sum stated as the index figure in the Index of Retail Prices (the "**Index**") for the month in which my death occurs bears to the index figure in the Index for the month in which this will is executed.



### Legacy Intention Form

The information provided is not legally binding and will be treated in the strictest confidence.

Title ..... First name ..... Last name .....

Address .....

Address .....

City ..... Postcode ..... Country .....

Email ..... Telephone .....

I will include/I have already included\* a gift to the Institute of Historical Research in my will  
\*delete as appropriate

Residuary     Pecuniary     Specific     Reversionary     Other

I would like my gift to be used for:

General purposes     Specific purpose .....

Please indicate an approximate value (if known) £ .....

I would like my legacy to be anonymous

I am considering making a bequest to the Institute of Historical Research. Please contact me by:

Telephone     Email     Letter

Signature ..... Date .....

Thank you for letting us know your intentions.

**Please return to:**  
IHR Development Office  
Senate House, Malet Street  
London WC1E 7HU

The IHR Trust is a Registered Charity, Number 1077592