

DIOCESE OF ARUNDEL AND BRIGHTON

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

LEGACIES AND BEQUESTS

Thinking about old age and death is never easy. But it really is important to plan what you want to happen to your money and to your belongings because if, for example, you have no surviving relatives, everything will go to the State unless you have made a Will.

What is a Will?

A Will is a legal document that enables you to decide where you want your money and possessions to go. So, if you make one, you can be sure that your wishes will be carried out – making sure that your families are provided for and that each of your friends receives what you feel is right.

You can also use your Will to leave something to the Church and many Catholics feel that this is a wonderful way to both thank God for the blessings that they have received during their lifetime and to help the Church to meet the needs of the next generation.

How to Make a Will

Making a Will is usually very easy and it costs less than you may think. Many solicitors charge less than £100 for a simple will but, if you are going to keep the cost down, it is important that you do two things before you meet with a solicitor. First, you must decide what you want to leave everybody. Second, you will need to have all the information that will be needed to make the Will.

How Can You Help The Church?

When you make or change your Will, you will obviously be thinking about your family and friends. But you could also make a gift to the Church. For example, you might decide to remember your parish in your Will and here are just a couple of examples of legacies that have been given to parishes in this Diocese:

- ❖ St. Joseph's Parish, Brighton – Legacy used to repair external fabric of listed church.
- ❖ St. Charles' Parish Worthing – Legacy used to refurbish and improve the parish hall.

Alternatively, you could decide that you want to provide funds to support priests in their old age or through an illness or the training of new priests, or just generally to help the Diocese.

It's up to you to decide how you want to support the Church.

How Helping The Church Can Help You

If you are single, the Government will take 40% in tax on everything over £275,000 and that may well affect you if you own property. But everything that you give to the Church as a charity will be tax free, so you can use a legacy to reduce the amount of tax that will be paid.

We give below suggested forms of words that can be included in your Will. These should be given to your legal adviser. Please contact us if you need further advice.

The Finance Office
Bishop's House
The Upper Drive
Hove, East Sussex. BN3 6NB

Tel: 01273 506387
Fax: 01273 859713
email:finance@dabnet.org

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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 6NE 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.....] 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 6NE 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, Diocesan Missions, etc.
2. The minimum sum for a Foundation mass is £300.