



## WORDING FOR LEGACIES IN A WILL

The Diocesan Registrar, Mr Anthony Jenkins, welcomes inquiries from Clergy and Laity in relation to wills, trusts, property and all legal issues involving the Church and its affairs.

As Diocesan Registrar, he has been asked about the preferred wording for a legacy in a Will giving money to either the diocese or an individual church. He suggests the following alternatives:

### OPTION 1:

I give the sum of £/my residuary estate to the St Davids Diocesan Board of Finance for such Ecclesiastical charitable purposes as the Board shall in its absolute discretion decide and I declare that the receipt of the Secretary for the time being of the said Board shall be a full and sufficient discharge to my Trustees.

### OPTION 2:

I give the sum of £/my residuary estate to the St Davids Diocesan Board of Finance to be held on trust for *[the Vicar and Church Wardens for the time being]/[the Parochial Church Council]* of the parish of ..... for such religious purposes in the said Parish as *[the said Vicar and Church Wardens]* or *[Parochial Church Council]* shall in their absolute discretion think fit and I declare that the receipt of the Secretary for the time being of the said Board shall be a full and sufficient discharge to my Trustees and I further declare that both the income and the capital of the said money may be expended in the manner aforesaid.

*Either of these clauses could have added to it a non-binding request such as "...and I request (without imposing any legal obligation whatsoever) that the income of the said sum shall be applied towards [...]*

For further advice and guidance, contact Mr Jenkins at:  
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