

Creating a Legacy

A legacy is a way of making a donation to Mental Health Research UK in the future. If you have not made a Will, please consider making a bequest to Mental Health Research UK. Legacies to a registered charity such as Mental Health Research UK are usually exempt from inheritance tax. If you have already made a Will then a codicil can be added.

Making a Will

It is usually best to ask a solicitor to draw up a Will for you. The Law Society has a list of law firms (0870 606 6575).

There are different types of legacy:

A **pecuniary legacy** is a fixed sum of money that tends to decrease in value over time because of inflation. It is possible to index-link a pecuniary legacy so that it maintains its intended value.

A **residuary legacy** is a gift of the remainder of your estate or part of the remainder after gifts to family and friends and all other expenses have been dealt with. Specific gifts such as property, shares, paintings or even jewellery can also be left to a charity.

Amending a Will

This is done by means of a codicil which states the changes to be made to an existing will. It is best done by a solicitor.

Sample wording

For a pecuniary legacy:

"I give the sum of £ [or details of the item to be gifted] free of tax to Mental Health Research UK, C/o of David Pugh, Hon Treasurer, MHRUK, Robertson Pugh & Co., 3 Leicester Road, Oadby, Leicester LE2 5BD (registered charity no 1125538) to be used by the Trustees of Mental Health UK at their discretion. I declare that the receipt of the Trustees shall be a full and sufficient discharge."

For a residuary legacy:

"Subject to the payment of my debts, funeral and testamentary expenses, I bequeath the whole (or a percentage value) of my estate not otherwise disposed of by this my Will, to Mental Health Research UK, C/o of David Pugh, Hon Treasurer, MHRUK, Robertson Pugh & Co., 3 Leicester Road, Oadby, Leicester LE2 5BD (registered charity no 1125538) to be used by the Trustees at their discretion and I declare that the receipt of the Trustees shall be a full and sufficient discharge."

For further information, or to pledge support, please contact us by sending an email to trustees@mhruk.org

Thank you! At least 95% of all donations we receive will go to research