



# Derby Mountain Rescue Team

Registered Charity No 1089237

## Codicil Form Guidance Notes

You can easily add a gift to Derby Mountain Rescue Team as part of your will. If you have already made your will, a codicil form will allow you to alter it without needing to rewrite your will. A codicil does not change the terms of your current will, but allows you to add a new instruction.

**You should seek the advice of your solicitor or other professional adviser before entering into a Codicil, and ensure any Will or Codicil entered into is properly executed.**

The following points are some guidelines for completing a codicil.

- Once you have completed the codicil form, you will need to sign and date it in the presence of two witnesses. Both witnesses should then sign and date the form themselves in the appropriate sections.
- You should keep the original copy of the codicil with, but not attached to, the original copy of your will. You may wish to give a copy of your will and any codicils to your executor.
- Changes made to a will by crossing out existing instructions or writing in new ones will not be valid. If you wish to make major changes to your will, it would be best to consult your solicitor with a view to having the will re-written
- You may choose to leave a specific sum OR a percentage of the residue of your estate, but you may not choose both options.
- You may choose instead, or additionally, to leave a specific item or donations in lieu of flowers.
- The residue of the estate is the assets of the estate that are left after all specific gifts have been made. Leaving a percentage of the residue is the most valuable gift as it's value will increase over time.
- Any legacy left to a charity is exempt from inheritance tax, even if your own estate is liable.



# Derby Mountain Rescue Team

Registered Charity Number 1089237

## CODICIL FORM

*Please read the accompanying guidance notes before filling in this form.*

I [full name].....  
Of [address] .....  
.....  
..... Post code .....

Declare this to be a codicil to my last Will dated [date of last will].....

In addition to any legacies given in my said Will, I give free of inheritance tax to Derby Mountain Rescue Team (Registered Charity Number 1089237)

☐ the sum of £ .....

☐ .....% of the residue of my estate

☐ a specific item.....

☐ donations in lieu of flowers at my funeral

for its general charitable purposes.

I declare that the receipt(s) of the Treasurer or other duly authorised officer of Derby Mountain Rescue Team for the time being shall be a full and sufficient discharge to my executors. In all other respects, I confirm my said Will and any other codicils thereto.

Signed ..... Date .....

Signed by the above named in our presence and witnessed by us in the presence of him/her and each other.

### Witness One

Signature: .....

Name: .....

Address: .....

.....

.....

Occupation .....

Date.....

### Witness Two

Signature: .....

Name: .....

Address: .....

.....

.....

Occupation .....

Date.....