

# CODICIL



This codicil form can be used if you already have a Will and would like to add a gift to Sir William Borlase's Grammar School (Registered Charity No. 1096750). A codicil is a supplement to an existing Will that makes some amendments but leaves the rest of the Will intact. It is important not to write any alterations on your existing Will as it could become invalid.

Simply complete the form with the instructions below. We recommend keeping any codicils with your Will, but do not staple or attach.

You may prefer to donate a percentage of your estate to Sir William Borlase's Grammar School once other cash gifts, taxes and bills have been paid - this is called a residuary gift. This is another good way to support a cause that is important to you. However, this form is not suitable for a gift of this nature and you will need the advice of a solicitor.

We would also recommend that you seek the advice of a solicitor if you are:

- (a) making a number of significant or complex changes or
- (b) having any concerns about how to draft a Will or codicil.

## Completing your codicil form:

1. Print off the form single-sided so that the back remains blank. Complete your personal details including information about any previous codicils and the date of your original Will
2. Decide whether you would like to leave a set sum of money and/or a specific item. You can also choose to index link your gift, please see the Notes section below
3. Sign and date the form in the presence of two independent witnesses as you would have done for your Will
4. After you have signed, ask your two witnesses to sign and complete their details on the form. Ensure you are present when your two witnesses sign the form.

## Notes

- Your witnesses must be over 18 years old and should not be beneficiaries or an executor (administrators) of your Will or their spouses/civil partners. They need not be the same people that you asked to witness your original Will
- A cash gift can be linked to the index of retail prices, allowing the value of your gift to keep pace with inflation.

If you need any further information, please email [Celia Blakeway-Phillips](mailto:Celia.Blakeway-Phillips@swbgs.com), Development Director or call 01628 816519 or email [celiabp@swbgs.com](mailto:celiabp@swbgs.com) in strictest of confidence.

# Codicil

**I (full name)**

\_\_\_\_\_

**Of (address)**

\_\_\_\_\_

\_\_\_\_\_

**Postcode**

\_\_\_\_\_

declare this to be a  First  Second  Third codicil to my Will, dated and made on the day/month/year \_\_\_\_\_ (date of original Will)

**I give**

the sum of £ \_\_\_\_\_

the sum of money produced by dividing the sum of £ \_\_\_\_\_ by the index figure in the Index of Retail Prices ('the Index') for the month in which this codicil is executed and (having made allowance for any re-basing of the Index which may have happened in the meantime) multiplying it by the index figure in the Index for the month in which my death occurs.

the following specific item(s), namely

\_\_\_\_\_

to Sir William Borlase's Grammar School (Registered Charity No 1096750) of Sir William Borlase's Grammar School, West Street, Marlow, Buckinghamshire, SL7 2BR, for its general charitable purposes, and I direct that the receipt of the Headmaster, or duly authorised officer, shall be a valid and appropriate form of discharge of my Executors/Trustees.

In all other respects, I confirm my Will and any other codicils thereto.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signed by the above named Testator as a codicil to his/her last Will in our joint presence and then by us in his/her presence.

**Witness one:**

**Witness two:**

Signature \_\_\_\_\_ Signature \_\_\_\_\_

Full name \_\_\_\_\_ Full name \_\_\_\_\_

Address \_\_\_\_\_ Address \_\_\_\_\_

\_\_\_\_\_

Postcode \_\_\_\_\_ Postcode \_\_\_\_\_

Occupation \_\_\_\_\_ Occupation \_\_\_\_\_

Date \_\_\_\_\_ Date \_\_\_\_\_