



The Catholic Church in Jersey

Catholic Pastoral Services

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Bequest Intention Instruction Form (Making a Gift through a Will)

In order that we may properly thank you, please fill out the following information as it applies to your future gift of a bequest through your Will or Trust. Please return this form to the Island Finance Manager.

Please Note: Completing this form is not binding. To effectuate a change in your will, you must contact your lawyer. Typically, this means meeting with your lawyer and completing a brief attachment that simply adds the Portsmouth Roman Catholic Diocesan Trustees (for the Catholic Parish in Jersey) as a beneficiary. Please meet with your lawyer to make the necessary changes and take a copy of this form with you to provide your lawyer with the appropriate contact information.

My Will/Trust was signed on

My Will/Trust provides that £..... shall be bequeathed to the Portsmouth Roman Catholic Diocesan Trustees (for the Catholic Parish in Jersey).

My Will/Trust provides that% shall be bequeathed through my will to the Portsmouth Roman Catholic Diocesan Trustees (for the Catholic Parish in Jersey). As of today's date, I estimate that the value of this provision of my estate plan would be approximately £.....

Donor's/Donors' Name(s):

Donor's/Donors' Signature(s):

Date:

Telephone Number:

Lawyer's Contact Information:

Instructions and next steps

As the Parish is a legal part of the Diocese, it is important that the language below be included.

1. Please take a copy of this form to your lawyer.
2. When your Will has been changed to include the Catholic Parish of Jersey, please provide the parish with the relevant portion of your Will so that your intentions are honoured.
3. All information will be treated confidentially.
4. All legacy donors will be recognized as members of the St Edmund of Abingdon Society unless you indicate otherwise. If you wish to remain anonymous and not be recognized as a member of the St Edmund of Abingdon Society, please tick the box below.

Please do not recognize me as a member of the St Edmund of Abingdon Society. Leave my name out of any publications that thank people who donate through their Wills.

Language for Inclusion in your Will

I GIVE AND BEQUEATH to the Portsmouth Roman Catholic Diocesan Trustees Registered the sum of £..... to be expended with the income thereof for such charitable purposes of the **Catholic Parish of Jersey** in the said Diocese as the said Diocesan Trustees shall in their absolute discretion think fit and I DECLARE that the receipt of the Secretary to the said Diocesan Trustees or other duly appointed officer shall be a full discharge to my Trustees (Executors) for the sum hereby given and my Trustees (Executors) shall not be bound to see or enquire into the application thereof.