

Let your life speak on

Leave a legacy for Quaker work



Thank you for considering leaving a gift in your will to support Quaker work. We are very grateful for any gift, however small. The information below is provided as a supplement to our Legacy brochure [create link] and includes:

- Recommended wording for leaving a bequest in your will
- An outline of how to write to a letter of wishes
- A glossary of legal terms.

There is also a separate section of Frequently Asked Questions [create link].

If you have further questions, please contact us at contributions@quaker.org.uk or phone 020 7663 1117.

What wording should I use to leave a gift to Quaker work?

A will is a legally binding document so it's important to get legal advice when you make one. Information included here is provided in good faith, but Britain Yearly Meeting cannot accept responsibility for any steps taken as a result.

You can leave a legacy for general Quaker work or for a specific meeting or purpose but using the wording below is recommended to help minimise any confusion later. You can also leave a general bequest for Quaker work in your will and give guidance about how you would like it to be used in a 'letter of wishes' (see below).

We are always delighted to receive a legacy for particular work or projects, but times and needs change, so we ask that any earmarking is fairly broad, or that a specific bequest contains the words "without creating a binding obligation". We will always apply the money to the nearest possible purpose to the original intention, but this gives us flexibility and makes sure that we can always use your legacy gift well.

Suggested wording for bequests to Quaker work

A bequest to Britain Yearly Meeting for general funds

“I give, free of taxes, as a charitable bequest, [either a specific sum, or a proportion of the residuary estate] to Britain Yearly Meeting, Friends House, 173 Euston Road, London NW1 2BJ, Registered Charity Number 1127633, or its successor in title, to be used as to both capital and income for the general purposes of the Religious Society of Friends (Quakers) in Britain. I direct that the receipt of the Finance Secretary for the time being, or other duly authorised officer, shall be a full discharge to my executors.”

A bequest to Britain Yearly Meeting for a specific area of work

“I give, free of taxes, as a charitable bequest, [either a specific sum, or a proportion of the residuary estate] to Britain Yearly Meeting, Friends House, 173 Euston Road, London NW1 2BJ, Registered Charity Number 1127633, or its successor in title, for the Religious Society of Friends (Quakers) in Britain, with the wish, but without creating a binding obligation, that it be used as both capital and income for the work of [name of project, or kind of work]. I direct that the receipt of the Finance Secretary for the time being, or other duly authorised officer, shall be a full discharge to my executors.”

A bequest to local or area Quaker meeting funds

“I give, free of taxes, as a charitable bequest, [either a specific sum, or a proportion of the residuary estate] to Friends Trusts Limited, Friends House, 173 Euston Road, London NW1 2BJ, registered charity number 237698, to be used as to both capital and income for the benefit of the Religious Society of Friends [name of meeting] [Local or Area] Quaker Meeting, or its successor in title. I direct that the receipt of the Secretary for the time being, or other duly authorised officer, shall be a full discharge to my executors.”

What is Friends Trusts Limited?

It is the denominational trust corporation which can act as custodian trustee or nominee for the Society and other related organisations. It is based at Friends House. As a registered charity, it has a charity number and clear charitable status. Legacies to local or area meetings should be left to Friends Trusts, which will pass on the gift to the meeting you have named in your will.

What if I want to add to, or amend, my will?

If it's a simple amendment, you can do this by writing a codicil. This is a formal document, signed and witnessed like a will, that details the changes from the original will.

Do I have to tell the Society about my legacy?

No, although we would like you to. We recognise that a gift in your will is often the biggest you'll ever make, and we'd like to be able to thank you, and to keep in touch with occasional updates about our work, as you wish. There's no obligation to give us any details about your legacy, nor to tell us if you change your mind.

How do I write a letter of wishes?

A letter of wishes is additional guidance and can offer practical and emotional support to your family and friends after your death. It allows you to give guidance on how you would like your gift to be used. Because a letter of wishes is not legally binding, it can remain private, unlike a will, which is a legally binding document and may become a matter of public record.

There is no set format and you don't need a solicitor to write a letter of wishes. The letter can be kept simple but needs to be signed and dated and you should take care not to write anything that contradicts your will.

You can find more information about writing a letter of wishes on our website www.quaker.org.uk/legacy or email us for more information.

Glossary of terms when writing a will

Beneficiary

Somebody who receives something under the provisions of your will. This can be a person or an organisation, charity or cause to which you have left money or other goods.

Codicil

A separate document that adds to or changes your will. You can add a codicil at any time, if the provisions of your existing will need a minor change or addition.

Estate

The sum total of everything you leave in your will, including money and possessions.

Executor

In your will, you should specify who will carry out your instructions, such as ensuring that your property is given to the people you nominate. These are your 'executors'. They can be people you know personally, such as relatives or friends, or they can be professionals such as your solicitor.

Intestate

If you die without making a valid will then you will be 'intestate'. Since there is no statement of your wishes, your estate will be distributed among your spouse or civil partner and your other relatives in proportions laid down by law – and not necessarily how you would wish.

Legacy

This is not a legal term but refers to any gift that you leave for a particular purpose or to a person or organisation. For Britain Yearly Meeting and other charities, it reflects the importance that we place on the benefits we receive from people in their wills.

Legacies are the biggest source of income for many charities, and guarantee that our work can continue.

Pecuniary gift

A gift of fixed amount. This value of a pecuniary gift will be subject to inflation and may need reviewing from time to time as it may end up being worth less than you originally intended.

Probate

The formal process that establishes that your will is valid and that the executors are therefore allowed to administer your estate as you have specified.

Residuary gift

A share of your total estate after all the other payments have been deducted. Because a residuary gift is a simple percentage of your estate the gift will hold its value.

Specific gift

A gift of personal possessions, property or shares.

Testator

The person making the will.

Witness

Your signing of the will must be witnessed by two other people, neither of whom can be a beneficiary of the will. Your solicitor will advise and may be able to provide independent witnesses