

Making your will

When instructing your solicitor it is important to name **Downside Abbey General Trust** as the beneficiary and to quote our Registered Charity Number **232548**.

- A specific bequest can be a fixed sum or a percentage of your residual estate.
- A reversionary legacy passes to Downside after the death of any dependants.
- A conditional legacy names Downside as the beneficiary should your heirs not survive you.

If you would like any further information before completing this pledge please contact the Development Office on 01761 235158 or jvines@downside.co.uk



www.downside.co.uk

Downside
Stratton-on-the-Fosse
Radstock
Bath BA3 4RJ

Tel 01761 235158

Email development@downside.co.uk

www.downside.co.uk

DOWNSIDE
ABBAY

Your history is our future

10% OF LEGACIES



In his recent budget the Chancellor of the Exchequer reduced Inheritance Tax for those willing to pledge 10% of their estate to charity. *“If you leave 10% or more of your estate to charity, then the government will take 10% off your inheritance tax rate. I want to make giving 10% of your legacy to charity the new norm in our country,”* George Osborne said.

Downside is a Registered Charity but has no significant endowment to fund the maintenance of our historic buildings. The magnificent Grade I listed Abbey Church, its nave built as a memorial to Old Gregorians who gave their lives in the Great War, is a considerable responsibility for the Monastic Community to maintain. This new tax incentive gives us a vital opportunity to build a fund for the future and create a long term source of income to ease that burden and guarantee the preservation of our heritage for future generations.



THE PETRE SOCIETY



Named after one of our greatest benefactors this group of like minded people have all pledged a legacy to Downside. The members, who now number well over 50, meet every October for Mass in the Abbey Church with the Abbot followed by a convivial lunch with members of the Monastic Community.

Please remember us in your will and if you have already made yours, a codicil can be added at any time. If you value our principles and want to help us secure our future for future generations this may be a way to help us that has little impact on your estate. Please let us know your intentions by completing the attached pledge form and returning it to us. This is not a binding commitment, simply a statement of intent however, it will enable us to welcome you back to Downside as a member of the Petre Society and say thank you to you in person.



Legacy Pledge

Downside Abbey General Trust - Registered Charity Number 232548

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I have made a bequest to Downside in my will and estimate the value/percentage will be _____

Name _____

Address _____

Postcode _____

Telephone _____

Email _____

Mobile _____

This is not a binding commitment but a statement of my intention. I would like my legacy to support:

- As the Abbot sees fit
- The Monastic Community
- Downside School
- Bursaries

Please tick this box if you would like to remain anonymous

Signed _____

Date _____

Thank you for completing this form and please send to:-
The Development Office, Downside Abbey & School,
Stratton-on-the-Fosse, Radstock, Bath BA3 4RJ