

TAXAID UK

(Operating as TaxAid)

LEGACY GIFT

TaxAid is pleased and proud to help people on low incomes with every kind of tax problem, complex or simple. TaxAid is never more than a phone call away. The number is 0345 1203779. TaxAid has circa 50 volunteers, all skilled tax practitioners, who give their time freely to people like you. TaxAid never charges for its advice but depends on VOLUNTARY DONATIONS.

We know that many of the clients we help cannot afford to pay for tax advice and not everyone can donate now. But would you consider leaving a legacy for TaxAid in your Will?

* One hundred pounds would pay the travel costs of all our Volunteers to visit vulnerable clients every week in safe locations.
* Five hundred pounds would keep our office open for a week and provide a welcoming and confidential space for clients in need of our help.
* One thousand pounds would keep our helpline open for a whole month and answer 600 calls to those looking for advice.

Why TAXAID?

Although everyone knows us as TAXAID, our legal name is TAXAID UK. Be assured that all legacies left in that way will be used for TAXAID.

If you have a Will already – and everyone should have one – then you do not need to change it. You can make a Codicil in the form set out over-leaf. All you have to do is write in the figure (in words) and sign it in the presence of two witnesses who should sign and add their names and addresses where shown. They should not be beneficiaries under your will.

If you don’t have a Will then the next course is to consult a local solicitor. They do not usually charge highly for giving professional advice and ensuring your Will accords with your wishes. Tell them about the legacy you would like to leave for TAXAID and give them this leaflet. We will gladly provide further copies.

But if you can’t afford a solicitor, and your wishes are simple, you can down-load a Will form on the internet. We do not recommend this, but it is usually better than having no Will at all.

This is a Codicil to my last Will.

I (Full name)……………………………………………………………………………………………

In addition to all other legacies I GIVE TAXAID (Registered Charity Number 1062852 in (England & Wales) the sum of (Write in words)

……………………………………………………………………………………………………………….. Pounds

For the general purposes of its Programme TAXAID

AND I DIRECT that the receipt of a person apparently authorised by the Charity shall be a full discharge to my executors.

IN WITNESS of which I have signed this Codicil the …………….day of ………….

Two thousand and ………………………………..

(Sign here) ……………………………………………..

The above named signed this Codicil in our joint presence and we have each signed as witnesses in his/her presence and in the presence of each other.

Witness 1. (Sign) ………..……………………….

Full name of Witness 1.

…………………………………………………………………………………………………………………………………..

Full address of Witness 1 …………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………

Witness 2. (Sign) ………………………………….

Full name of Witness 2.

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Full address of Witness 2. …………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………