



Battens Charitable Trust Free Will Scheme

Are you over 55? Would you like to make a Will for free?

Battens Charitable Trust has authorised Battens Solicitors to provide a free, simple will for anyone over the age of 55, dependent upon you leaving a minimum of £1000 to the scheme. This will be payable upon your death.

If your will is more complicated the Trust will cover the first £125 + VAT for an individual will or £200 + VAT for a joint will.

Battens Charitable Trust was set up in 1985, to enable grants to be made to registered charities and for charitable purposes in Somerset, Dorset and adjoining counties.

If you would like to leave a legacy to a charity or make a donation, Battens Charitable Trust is an ideal way to do this. It enables various local charities to benefit from your generosity. In the past the Trust has made donations to local schools, youth organisations, hospitals and hospices, wildlife and the disabled to name but a few.

Your gift to Battens Charitable Trust will go on to help charities in need in the Somerset and Dorset area and as Battens do not make any charge for administering the Trust, worthy causes receive the maximum benefit of donations.

Applications for the Free Will Scheme can be made by your chosen Solicitor at Battens.

All sections of the form must be completed in order for the application to be processed.



You MUST Complete ALL Sections of this form.

Title First Name(s)

Surname

Date of Birth

Address

Postcode

Title First Name(s)

Surname

Date of Birth

Address

Postcode

Please tick relevant box

This is my/our first will Updated Will Codicil

I / We have benefitted Battens Charitable Trust in my / our Will

A set sum of money (if so how much?) index linked?

A share of my / our residuary estate (Please estimate value of donation)

A Specific possession (estimated value)

A contingent gift (estimate value)

How did you hear about Battens Charitable Trust Free Will Scheme?

I/We confirm that I/we understand and accept the terms and conditions of the Charitable Trust Free Will Scheme contained in this leaflet. I/We have obtained Battens legal advice.

Partner 1 Signed Dated

Partner 2 Signed Dated

Terms & Conditions: Your gift to Battens Charitable Trust will allow us to continue our contribution in the local community. Battens Charitable Trust reserves the right to withdraw the service at any time, public notice of which will be given at the earliest possible date.