

Pledge form

I wish to include William Harvey Research Foundation in my Will.

Title:

Forename:

Surname:

Address:

Postcode:

Telephone:

Email:

Signature:

Date:

In recognition of your pledge, you will automatically become a member of the Fellows’ Circle, which will hold regular events to keep you in contact with **William Harvey Research Foundation**.



Please tick the box(es) that apply to you:

☐ I do not wish to become a member of the Circle.

☐ I wish my gift to remain anonymous.

Please return the completed form to our address at:

William Harvey Research Foundation
John Vane Science Centre, Charterhouse Square
London EC1M 6BQ

Codicil form

I

of

declare this to be a (first/second) codicil to my last Will dated the / / (“the Will”).

In addition to the gifts in the Will I give to the William Harvey Research Foundation (WHRF) the sum of:

£ .

for its general purposes. The receipt of the Chairman or Company Secretary of the WHRF shall be sufficient discharge to my Executors.

In all other respects I confirm my Will.

As witness my hand this / /

Signed by the said:

As a (first/second) codicil to his/her Will in our joint presence and then by us in his/hers.

First witness*

Signature of witness:

Name:

Address:

Second witness*

Signature of witness:

Name:

Address:

*Witnesses should not be beneficiaries under the Will (or any Codicil), nor married to beneficiaries.



YOUR LEGACY
helps build an endowment,
thus ensuring that the
Foundation can respond
to the Institute’s research
needs in the future



**William Harvey
Research Foundation**
John Vane Science Centre
Charterhouse Square
London
EC1M 6BQ

development@whrf.org.uk
www.whrf.org.uk



Registered in England - Registration No. 2472965
Charity Registration 803012



**Your guide
to gifts in
Wills**

Why leave a legacy to William Harvey Research

William Harvey Research (WHR) was established in 1986 by Sir John Vane, who won a Nobel Prize for establishing how aspirin works (among many other discoveries). Sir John Vane's original small team has grown into an internationally-recognised institute comprising over 500 scientists from around the world. WHR has a global research reputation in the medical world but remains relatively unknown outside scientific circles; this has limited its ability to attract financial support.

The Foundation benefits from income generated by the commercial activities of WHR (contract research, medical training programmes, and conference organising), but it has no endowment; we are therefore seeking support from benefactors, including alumni. One way to help is by including WHR in your Will: legacies allow the Foundation to continue its tradition of supporting excellence in research, and the top priority for legacy support is to build an endowment, thus ensuring that the Foundation can respond to the Institute's research needs in the future.



“I really value the funding the William Harvey Research Foundation provided me, it enabled me to carry out a pilot project that was far too preliminary for larger funders.”

Legacy gifts



LEGACIES
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Making a Will

Ensuring your estate is allocated as you would wish, by making a Will, is important: firstly, it saves problems for your family, because when someone dies intestate, the law dictates how the estate is divided. Intestacy can also mean that more Inheritance Tax than necessary is paid, and that the beneficiaries are not necessarily those you would have chosen.

There are several different ways of leaving a legacy.

Pecuniary: a simple legacy of a specified sum.

Residuary: the residue of your estate (after other legacies and expenses have been paid).

Conditional: if none of your named dependants/beneficiaries survive you.

Reversionary: leaving assets to Trustees for the benefit of beneficiaries during their lifetime; they enjoy the income, and the assets are transferred (e.g. to WHR) after their deaths.

Non-monetary: gifts such as investments, property, art etc. can be bequeathed.

In addition, if you are a beneficiary under a Will, you can transfer all or part of this inheritance by Deed of Variation (such transfers are free of Inheritance Tax).

If you have already made a Will, the easiest way to include an additional legacy is by adding a codicil; forms overleaf show how gifts to WHRF can be made.

Wording for different types of gifts in a Will



Pro-forma pecuniary legacy clause

I give to the William Harvey Research Foundation (WHRF) the sum of £ (figures and words) (“the Fund”), to be held by WHRF for its general purposes.

I request, but without imposing any obligation, that the WHRF use the Fund to (wishes/preference).

The WHRF may use both the income and capital of the Fund.

The receipt of the Chairman or Company Secretary of the WHRF shall be a discharge to my Trustees for the Fund.



Residuary legacy clause

I give the remainder of my Estate, after payment of my debts and expenses, to my Executors, to be held for William Harvey Research Foundation (WHRF) for its general purposes.

The receipt of the Chairman or Company Secretary of WHRF shall be sufficient discharge to my Executors.

