

Chelmsford Diocesan House of Retreat



Gift the Retreat House
a permanent legacy



HOW TO MAKE A LEGACY TO THE RETREAT HOUSE



If you would like to remember the Retreat House in your Will, there are several types of legacy that you can consider:

RESIDUARY LEGACY — this comes out of the remainder of your estate after all other legacies, debts, tax and expenses have been paid. It may comprise the whole or a share of the residual amount. All legacies are greatly welcomed but this type of legacy has special benefits as its value keeps pace with the increase in value of your estate, offsetting the effect of inflation.

SPECIFIC LEGACY — a gift of a particular item such as property or shares.

PECUNIARY LEGACY — a specified cash sum. To ensure the value of your gift reflects your changing circumstances and the effect of inflation, you should review pecuniary legacy amounts regularly.

If you are leaving a legacy to The Retreat House, it would be very helpful if we could have a note of it. If you would like to do this, please make use of the pledge form on the reverse of this leaflet.

If you haven't already made your Will, we would suggest that you use the services of a Solicitor or other professional adviser to do so. It need not be expensive, and professional advice will ensure that your wishes are properly recorded and followed. Before you see a professional adviser, it may save time to contact them and find out what information you should have with you when you see them.

It is very easy to amend an existing Will to include a legacy to The Retreat House. Your professional adviser will help you draw up a form called a codicil to do this. If your personal circumstances have changed, a new Will may be required; your professional adviser will be able to guide you on this.

Under current law, when you make a bequest to a registered charity such as The Retreat House, the amount of your gift is deducted from the value of your estate before any tax liability is calculated; it is completely free from Inheritance Tax and therefore can reduce the tax liability on your estate.

GIFTS MADE IN YOUR LIFETIME — Gifts to help the work of the Retreat House are welcome at any time. A lifetime gift can be as tax-efficient as a legacy (depending on your circumstances). If you wish, you can be closely involved in how your money is used and see what it has achieved.

A GIFT TO THE RETREAT HOUSE IS A GIFT THAT WILL LIVE ON FOR YEARS TO COME

The Retreat House at Pleshey was the first of its kind in England. For almost 100 years it has provided a safe and tranquil environment where individuals and groups can draw close to God. It's a place where people can explore personal, theological and spiritual issues.

After 100 years, the building that provides this quietly inspirational environment needs to change so that we can meet the needs of our visitors for decades to come. We have already improved the ground floor to provide more meeting space and access to the house for those with mobility problems; largely funded by legacy giving. However, there is more that is required to be done to update other areas of the house.

The desire for the Retreat House and its mission and values will remain the same for decades to come but the requirements of our visitors will continue to change and so the building needs to change too. We can only do that with the continued support and giving of those who cherish this special place.



Walk softly in the ways of God
Listen gently to the voice of God
Sit quietly in the love of God
Pray humbly to the heart of God
Act boldly in the strength of God
Go forth in His name



The House of Retreat

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web: www.retreathousepleshey.com.

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Facebook: The Retreat House, Pleshey



**The Retreat
House,
Pleshey**

Pledging your gift: Thank you for making a legacy gift to The Retreat House in your Will. It would be a great help to us if you could just complete and return this note to let us know—but please be aware there is no obligation to do so and it is not binding in any way. The Retreat House fully respects the privacy of your Will.

Name: _____

Address: _____

Post Code: _____

Today's Date: _____

Please tick the relevant box(es):

I have already included a legacy to The Retreat House in my Will; the form of my gift is indicated below.

I intend to include a legacy to The Retreat House in my Will; the form of my proposed gift is indicated below.

Your Gift

My legacy to The Retreat House takes the form of:

The residual amount, or part of the residual amount, of my estate.

A cash gift

An item of value (such as property, stocks and shares, jewellery)

Please return to the Retreat House in an envelope marked 'Private' to:

The General Manager, The Chelmsford Diocesan House of Retreat, The Street, Pleshey, Chelmsford, Essex. CM3 1HA.
Tel: 01245 237251 email: retreathouse.pleshey@virgin.net web: www.retreathousepleshey.com