



# Bequests

Information and guidance regarding bequests and legacies (Gifts) given to the Methodist Church through a Will.

 Updated 14 Feb 2018

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## Introduction

People often want to provide financial support to the Methodist Church to help the Church to further Mission. One way to continue to support the Mission of the Methodist Church, locally or Connexionally is to leave a bequest or legacy (Gift) to the Methodist Church in your Will.

There are different ways in which Gifts can be given to the Church through a Will and it is important to speak to your solicitor or legal adviser to ensure that your intentions are carried out. You may want to ensure that the Gift is used for a specific purpose e.g. the upkeep of a specific chapel or youth work within a certain local church or Circuit? Alternatively you may feel happy to leave the local church, Circuit, District or Connexional body to decide how the Gift can best be used to further Mission? There are also questions over whether you intend the whole Gift to be used or to provide a lump sum where the Managing Trustees are only able to spend the income, leaving the capital intact? You can also ensure that the Gift is not lost to Methodism should the local church cease to meet. This is discussed below.

If you would like to leave a Gift to a local church, Circuit, District or Connexional fund to further Mission, or are acting for somebody wishing to leave such a Gift, please read the detailed guidance in the [Leaving a Bequest or Legacy to the Methodist Church Guidance Note](#). This explains the different types of Gift and how to leave Gifts including template wording.

## The Role of TMCP

TMCP is the Custodian Trustee for virtually all property, which includes money, by virtue of the Methodist Church Act 1976. Our role is to hold, on behalf of the Managing Trustees, all Gifts that have been left to the Methodist Church. This is always the case for gifts that have been left to the Church without restriction and therefore are classified as Model Trust monies but also for restricted or permanent Gifts which have been left to the Church. In relation to a Gift that has been left to a local church, if there are no conditions directed in the Will as to how the money is to be used then the Gift will fall within the definition of the Model Trusts.

This trust system has ensured that TMCP has been able to prevent thousands of pounds being lost to Methodism when the intended local church, Circuit, District or Connexional fund is sadly no longer in existence. As Custodian Trustee, TMCP will find the nearest benefit to that originally intended and Methodism will continue to benefit from the Gift left to the Church.

## Bequest Guidance

The bequest guidance notes produced by TMCP aim to provide information to individuals who are thinking of leaving a Gift to the Methodist Church, as well as to their professional advisers. The following guidance is currently available and will soon be accompanied by a Model Trust Legacies and Bequests Focus Note, which will explain to Managing Trustees the process that should be followed when they receive a Gift as well as Bequest FAQs.

[Leaving a Bequest or Legacy to the Methodist Church Guidance Note](#)

***If Managing Trustees or their Solicitors would like any further guidance then please do not hesitate to [contact TMCP](#).***

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## **+ Disclaimer**

Please note that this document is to provide guidance and assistance to Managing Trustees and their professional advisers. This guidance note is general in nature, may not reflect all recent legal developments and may not apply to the specific facts and circumstances of any particular matter.

Also note that nothing within the documents and guidance notes provided by TMCP nor any receipt or use of such information, should be construed or relied on as advertising or soliciting to provide any legal services. Nor does it create any solicitor-client relationship or provide any legal representation, advice or opinion whatsoever on behalf of TMCP or its employees.

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Please remember that Managing Trustees need to take advice that is specific to the situation at hand. This document is not legal advice and is no substitute for such advice from Managing Trustees' own legal advisers.

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A body corporate established by  
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Trustees For Methodist Church Purposes, Central Buildings  
Oldham Street, Manchester, M1 1JQ

Telephone: 0161 235 6770  
Fax: 0161 236 0752