

## Documentation for residuary legacies

Thank you for your help in enabling the legacy which will go toward our work helping veterans, we are very grateful.

There are certain documents we need to comply with both audit processes and Charity Commission guidelines. We do understand some won't be available until the estate is finalised but wanted to highlight what we will need.

- Details of administration costs
- S119 report for any property/land if applicable
- Interim/final Estate Accounts with distribution schedule
- IHT205 or IHT400 if applicable
- IHT calculations if IHT is applied to the estate
- Calculations showing how the value of the gift was reached
- Breakdown of charges and copy invoices at the end of the administration
- Will, codicils, Grant of Probate (Confirmation in Scotland)
- Letter of Wishes is applicable

## Our bank details:

Account name: Combat Stress  
Nat West Account: 00100013  
Sort code: 60-00-01  
City of London Office  
PO Box 12258  
1 Princes Street  
London EC2R 8PA

Please use the reference of the legator and the word '**legacy**' so we can let you know when any transfer has arrived safely.

Contact details: Sarah Seddon, Head of Planned Giving,  
[sarah.seddon@combatstress.org.uk](mailto:sarah.seddon@combatstress.org.uk)  
01372 587 144

If you have any questions, or if I can help in any way, please let me know.

Thank you.