St Ursula's Church, Bern
Legacy Policy
2026

Introduction
This policy describes how St Ursula's will administer and apply legacies it receives.

Definition
A legacy is money or property bequeathed to further enhance the life and mission of the church.

Application
The uses of legacies are to be approved and minuted by the Church Council.

The Church Council will discuss with the executors any specific donor requests:

- Where specific donor requests exist, the Council will endeavour to use the legacy for this purpose. However, as circumstances change over the years, it may not be possible to fulfil all specific donor requests. For this reason, church members are encouraged to leave legacies for the general purpose of the chaplaincy.
- Where no specific requests were made, then the Council will pray, discuss and agree on the most appropriate use of the legacy in the light of current projects and the donor's known areas of interest e.g. music, children & youth, buildings.

Generally, and depending on the size of the legacy and any restrictions attaching to it, a legacy (or where appropriate its income) should be used as soon as reasonably practicable.

Generally, legacies will not be used to cover general running expenses but for appropriate specific purposes which will add to the life and mission of the church. This includes appropriate maintenance of or addition to its buildings.

Except where the person who made the will or their family request otherwise, the church will give public thanks for a legacy once received. (This contrasts with the confidentiality with which potential legacies must be handled during the lifetime of the donor).

Administration

Although it is not mandatory, church members who intend to leave a legacy to St Ursula's Church or Charitable Association are encouraged to inform the Treasurer of this at the time of the writing of the will. This information will be recorded confidentially and only communicated to any future Treasurers during the lifetime of the donor. The donor has the opportunity at this point to also communicate his or her wishes for the use of the legacy.

A legacy register will be maintained and kept fully up to date. It records: the name and date of death of the donor; the nature or size of the gift; any restrictions on the use of the gift and (if none) any wishes or other guidance from the donor (or his/her family) on its use; and how and when the gift was used. If possible, a copy of (an extract from) the donor's will should be kept with the register.

The purposes of keeping the register include:

(a) providing transparent evidence of the generosity of those who have benefited the church in this way and that their wishes on its use were adhered to
(b) to confirm to the Church Council what those wishes were in the period between the gift being received and the actual application of the monies concerned.

A legacy will be shown on a separate line in the annual accounts.

V26.01 : Approved by Council on 26th October 2026