

## **Consultative document bequest, legacy and designation of an heir**

This document has been written based on swiss law and should provide some general informations about the organization of an heritage. Please keep in mind that depending on your living country, there may be differences. We would recommend to contact a professional of your own country to supervise and conduct the whole process of establishing a testament or a testamentary contract.

For the sake of convenience the masculine form is used in this document.

With a bequest to the Foundation for Cerebral Dysrhythmia, you would help to enhance the situation of patients suffering from chronic and therapy-resistant functional brain disorders in the long term.

There are following possibilities:

### **Bequest / Legacy**

You can decide to dispose of a certain amount of money or of possessions by will to an institution or a foundation.

### **Designation of an heir**

You can choose to designate an institution as a co-heir to a certain percentage or as a sole heir. In this case, it is important to consider and respect the obligations to the legal heirs (children, spouse, parents etc.)

A bequest or the designation of an heir are conducted in the context of a testament or a testamentary contract.

### **Autographic testament**

It has to be written by hand. Location, date and signature have to be valid.

### **Official testament**

An official testament has to be established by a commissioner of oaths (e.g. notary, district or municipality clerk). In Switzerland two attestor have to be present. An official testament is usually used when an autographic transcript is not possible.

### **Modifications**

You can decide to change, complement or suspend your testament at any time.

### **Testamentary contract**

A testament is unilateral, only the legator can make it and also change or cancel it.

Whereas in a testamentary contract at least to parties are involved (e.g. spouse, children). A testamentary contract can only be adapted if all contracting parties agree with it.

### **Complete arrangement**

If you would like to organize your entire inheritance (with bequests, legacies, the designation of heirs or other donations), we would strongly recommend to consult a qualified professional to help you.

### **Executor of will**

If your inheritance will be distributed amongst several persons or in the case of complicated circumstances, it is recommendable to designate an executor of will (e.g. lawyer, notary, bank, fiduciary).

### **Deposit**

It is advantageous to define a deposit, so that the testament remains findable. You should have the possibility to give it to the executor of will. If you prefer to store it in a safe deposit box at a bank, you should make sure that somebody else has a procuration.