

Frequently asked questions about legacies and gifts in Wills



Cumbria
Wildlife Trust

1. I'd like to make a gift to Cumbria Wildlife Trust in my Will. What information do I need to include?

Your solicitor can advise you on the correct wording, and it is helpful to include our full charity name, registered office address and registered charity number, as follows:

Cumbria Wildlife Trust
Plumgarths
Crook Road
Kendal
Cumbria LA8 8LX
Registered Charity No. 218711

2. What benefit will my gift to Cumbria Wildlife Trust have for wildlife?

A gift in your Will is one of the most valuable ways you can help our local wildlife and ensure your wishes live on. Gifts in Wills have already helped us to:

- ❖ Protect endangered species (including red squirrels, fritillary butterflies and rare orchids)
- ❖ Buy and manage nature reserves for wildlife (including Eycott Hill, Smardale and Brown Robin nature reserves)
- ❖ Inspire children and adults about the natural world
- ❖ Make space for nature across our towns, countryside and coast

Gifts in Wills have enabled us to carry out some amazing projects to support Cumbria's unique wildlife. Your Will is the final and possibly most significant gift you will ever make, allowing you to influence the world you leave behind for future generations to come.

3. Why is it important to have a Will?

Making a Will is the only way to ensure that your wishes are carried out after your death. By having a valid and up to date Will you can ensure that your family and friends are provided for, as well as helping charitable causes that are close to your heart.

If you die without making a Will the State decides what happens to your estate, and this could result in your estate not going where you would have wished.

4. What types of gift are there?

There are three different types of gift you can leave in your Will:

1) Percentage of your estate – This may be what is left after other gifts have been given out. Even a small percentage of your estate will make a big difference to what we can achieve for wildlife. A 1% gift means your loved ones will still benefit from 99% of your estate. The advantage of this kind of gift is that it will increase with inflation over time, while a cash gift will not.

2) Cash gift – This is a specified amount of money from your estate. You can use a codicil to easily make an addition to your existing Will without having to rewrite it.

3) An item (e.g. property or land). If this is the case, we recommend that you contact us, so that we can work together to ensure that your wishes are, or can be, accommodated in the Trust's plans. Cumbria Wildlife Trust will always take account of your wishes for the future use of your gift.

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5. I'd like to leave a gift to Cumbria Wildlife Trust but I've already written my Will. Do I need to write a new Will?

No. Your solicitor can add a codicil to your existing Will that details changes or additions you wish to make to your original Will. Codicils are an easy and inexpensive way to make an addition to your Will. Talk to your solicitor for further details.

6. Can you recommend a solicitor?

Using a solicitor is the best way to make sure that your wishes are followed. We cannot recommend a specific solicitor. The Law Society website can help you find a solicitor. Visit www.lawsociety.org.uk

We work with solicitors across the county who make a donation to Cumbria Wildlife Trust if a supporter writes a Will with them. The scheme runs from September until the end of November. These solicitors are listed on our website.

7. Do I pay tax on my gift?

No. If you leave a legacy to Cumbria Wildlife Trust the value of the legacy is deducted from your estate before inheritance tax is calculated. It may also reduce your Inheritance Tax rate, if more than 10% of your estate is left to charity.

8. Can I request that my legacy is used for a particular purpose?

We benefit most from gifts that are not restricted to a specific purpose, allowing us to use the money where it is needed most when it becomes available. Nevertheless, if you are interested in restricting your gift to a particular area of work, we are happy to accommodate this. We would recommend that you contact us in the first instance to discuss your wishes.

9. Can I name Cumbria Wildlife Trust as an executor?

No, we cannot act as your executor. It is recommended that you choose a solicitor or a trusted friend or family member. It is the responsibility of your executor to follow the instructions in your Will and to find fair solutions to any issues that may arise.

More advice is available from the Money Advice Service. Visit www.moneyadviceservice.org.uk or call 0800 138 7777.

10. I have already included Cumbria Wildlife Trust in my Will. What else do I need to do?

If you have already been generous enough to include the Trust in your Will, we offer heartfelt thanks. There is no obligation for you to let us know about your gift, but if you do, it will be kept confidential and will allow us to thank you.

11. What if my circumstances change or I change my mind?

It is a good idea to review your Will from time to time to ensure it reflects any changes in your personal circumstances. You are free to change your mind at any time. Letting us know you plan to leave a gift in your Will to Cumbria Wildlife Trust doesn't commit you to doing so. However, it would be really helpful if you could tell us if you do change your mind.

To discuss any aspects of leaving a gift in your Will, please contact Helen Duxbury on 01539 816300 or email helend@cumbriawildlifetrust.org.uk
Thank you for your support.