

The Lucy Faithfull Foundation's legacy information pack

Information on leaving a Will and FAQs

Leave a gift in your Will and become a Faithfull Friend

A gift can be made unconditionally (for the charity to use as it sees fit in furtherance of its charitable aims) or subject to wishes, conditions or terms. You could, for example, ask that the gift be used to support a specific project or purpose within the charity.

Types of gifts you can leave in your Will

A share of your estate (residuary gift)

This is a percentage of everything you own, minus any debts. This is a good thing to think about if you know you want to make a commitment, but don't necessarily know what your future finances might look like. It is also likely to be the most effective way of maximising inheritance tax relief on your estate (again, we recommend discussing this further with a legal professional if you would like to know more).

A cash gift (pecuniary gift)

This is when you leave a set sum of money.

A specific gift

This is when you leave a gift that is not money, for example, a house or a car.

A postponed gift (reversionary gift)

This is when you leave a gift to someone for a period of time and then the gift goes to another beneficiary, such as a charity. For example, you may wish for someone to live in your house for their lifetime, but then for it to go to a charity when they pass away.

Five simple steps to help you prepare for writing your Will

Step one: make a list of your assets

It can be a good idea to list your assets and estimate their value. This is something you can do yourself, saving you time and money with your solicitor. Your assets include things such as property, shares, savings and other items of value you own. The sum of these assets is your 'estate'.

Step two: make a list of what you owe

Always try to write down what you owe or are owed. Considering an outstanding mortgage, loans, or bills, will give you a much better idea of the value of your estate.

Step three: decide who you would like to benefit and how

Make a list of the people and organisations – such as the charities you support – that you wish to remember in your Will, and consider how you would like to divide your estate between them.

Step four: choose your executors and meet your solicitor

An executor is the person you choose to carry out the terms of your Will, to ensure your wishes are fulfilled correctly. Most people choose their solicitor or trusted family members as executors.

Step five: keep it safe and up-to-date

Your Will is a very important document. Most people prefer to leave it in the care of their solicitor or legal advisor and keep their own copy in a safe place, ensuring their executors know where to find it.

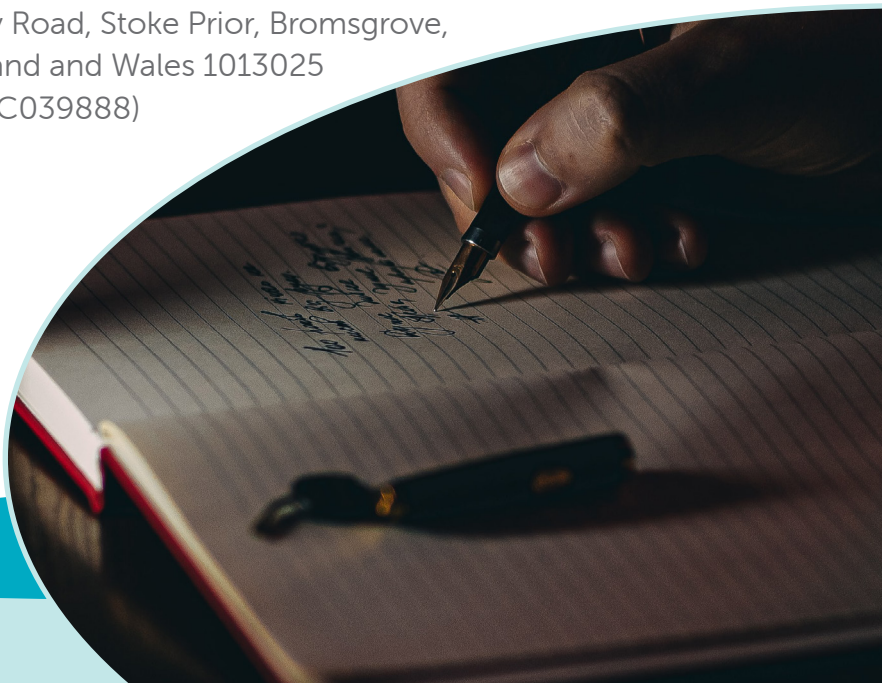
If you are updating an existing Will, you can choose to either make a completely new Will or add a 'codicil' which would set out the changes to your existing Will and be read alongside it. In both cases, we recommend you speak to your solicitor.

Suggested wording

If you would like to leave a gift to The Lucy Faithfull Foundation, we would recommend that you make or change your Will with the help of a solicitor or legal professional. When you leave a gift, you will need to decide the type of gift you would like to give. To make everything as straightforward as possible, we have provided some suggested wording to use for the two main types of legacy gifts.

Residuary gift (a percentage of your estate)

"I leave ___ percent of the residue of my real and personal estate to The Lucy Faithfull Foundation of Birch House, Harris Business Park, Hanbury Road, Stoke Prior, Bromsgrove, B60 4DJ (Registered Charity Number in England and Wales 1013025 and Registered Charity Number in Scotland SC039888) (the "Legatee")."



Pecuniary gift (a set sum)

"I give _____ pounds (£ ____) to The Lucy Faithfull Foundation of Birch House, Harris Business Park, Hanbury Road, Stoke Prior, Bromsgrove, B60 4DJ (Registered Charity Number in England and Wales 1013025 and Registered Charity Number in Scotland SC039888) (the "Legatee")."

In either case, whether you wish to make a residuary or pecuniary gift it may also be worth including wording along the lines of the following to make it clear whether you have any specific wishes in terms of how the gift should be used and to confirm (for the benefit of the personal representatives named in your Will) to whom (within the charity) the gift should be given:

"I request the Legatee but without imposing any binding trust or legal obligation to use the legacy for [...] OR [its general charitable purposes]."

The receipt of the treasurer or other appropriate officer for the time being of the Legatee shall be a good discharge to my Executors."

Frequently asked questions

Can I write my own Will?

For a Will to be valid, it must satisfy a number of specific legal requirements, in terms of the way that it is prepared and signed. To prevent any errors, we therefore recommend that you only write a Will through a qualified solicitor or a member of the Institute of Professional Will writers.

How does leaving a charitable gift in my Will affect my inheritance tax?

A gift to a charity may offer two inheritance tax advantages:

- The gift itself should pass free of inheritance tax. In other words, it will reduce the part of your estate that is subject to inheritance tax and in some cases may bring the "chargeable" element to within the available allowance, meaning no inheritance tax is payable.
- If the value of the charitable gift is of a certain size but the balance of the estate is still subject to inheritance tax, the rate of tax that applies may be reduced, saving yet more inheritance tax.

Your solicitor can advise further on how to structure your Will so as to ensure tax relief is captured and maximised.

How can I find a solicitor near me to make a Will?

You can visit the [Law Society website](#) for a list of legal professionals in your area.

Can I choose which project to leave my gift to within The Lucy Faithfull Foundation?

If you would like to discuss leaving a gift to a specific area of our work, then please get in contact with our fundraising team on 01372 847160, or email supporters@lucyfaithfull.org.uk.

Should I tell The Lucy Faithfull Foundation if I include them in my Will?

We really value being able to thank our supporters who have chosen to leave a legacy, but it's entirely up to you whether or not you share your intentions with us. We understand this is a personal and sensitive matter, and that people's circumstances and priorities can change over time.

What happens if I change my mind?

You are free to change your mind about leaving a gift in your Will to us at any time, and we completely understand that this is a personal decision. If you have told us that you are intending to leave us a gift, it would be helpful to let us know if that changes.

Free Will writing service

We have partnered with Kwil to offer our supporters the opportunity to write or update their Will for free in as little as 30 minutes.

To redeem your free Will* click [here](#) and use code LUCY at the checkout.

To speak to someone at Kwil, you can call 0800 061 4934 to talk you through the process.

For detailed advice on structuring your Will efficiently (to ensure you take full advantage of the potential tax relief referred to above, for example) you may of course prefer to consult your own solicitor.

*Remember, if you use our free Will service, you don't have to leave a gift to us in your Will - providing for your family, friends and loved ones should always come first. But if you do choose to remember us, thank you. Your gift will help us continue our work to prevent child sexual abuse.

Thank you again for thinking of leaving a gift in your Will to help us prevent more children and young people from being harmed.

This information pack is not intended as legal advice from The Lucy Faithfull Foundation. We recommend you seek independent professional advice when preparing your Will. If you have any questions at all, we would be delighted to help.

You can call us on 01372 847160 or email supporters@lucyfaithfull.org.uk.

For further information visit: lucyfaithfull.org.uk/legacies.

Connect online:

To keep updated with our news, follow us on social media or sign up to our newsletter lucyfaithfull.org.uk/signup.htm.

[Facebook](#) | [Twitter](#) | [LinkedIn](#) | [Youtube](#)

Charity information:

The Lucy Faithfull Foundation is a registered Charity No. 1013025, and is a company limited by guarantee, registered in England No. 2729957. Registered office: 2 Birch House, Harris Business Park, Hanbury Road, Stoke Prior, Bromsgrove, B60 4DJ.



Find out more about our work to protect children at: lucyfaithfull.org.uk

Visit our Stop It Now! campaign and helpline at: stopitnow.org.uk

Stop It Now! Scotland: stopitnow.org.uk/stop-it-now-scotland

Stop It Now! Wales: stopitnow.org.uk/wales

For prevention information visit: parentsprotect.co.uk

