



Yorkshire Wildlife Trust

Leaving a gift in your will

Here are some of the more frequently asked questions. If you do have a question that isn't answered below then please do get in touch either by emailing legacies@ywt.org.uk or calling 01904 659570.

How do I leave a gift?

It's really easy to leave a gift to charity – all you need to do is talk to your solicitor and let them know what you would like to leave; whether that's a percentage of your estate (known as a residuary legacy), a set amount (known as a pecuniary legacy) or a specific item such as land, shares or jewellery. Your solicitor will want to know the charity number of your chosen organisation. Yorkshire Wildlife Trust's charity number is 210807.

Aren't gifts in Wills just for wealthy people?

Not at all! Many people leave gifts to charities they care about or causes that are important to them. Once you have taken care of your family and friends, please consider leaving a small percentage to Yorkshire Wildlife Trust – leaving a percentage rather than a fixed sum means your beneficiaries receive the gifts you plan to leave regardless of inflation.

My Will is already written, is it too late to include you?

Adding to a Will is often very simple and your solicitor can do so very easily either with a simple rewrite or by adding a codicil.

What about Inheritance Tax?

Gifts to charity are usually free of inheritance tax and can often reduce the overall tax payable on an

estate, in some cases reducing the tax rate from 40% to 36% if you are leaving more than 10% of your net estate to charity. It is very important for you to speak to an expert if you would like to plan your Will in this way. Your solicitor will be able to advise you further.

Can I specify how a gift is used?

If you would like to leave us land or for us to use your gift in a certain way, please speak to us first to ensure that we will be able to honour your wishes. Legacies come in many different forms but the most useful bequest has no conditions attached; that is, we can use it according to our priorities at the time. If you have a specific request we will do our best to honour it. However, if there are strict conditions it may not be in the Trust's best interests to accept - for example, if you wish us to purchase land in an area where there is no land to buy or the cost to Trust is too high.

I'm an executor, what do you need from me?

It depends on whether we have been left a pecuniary or residuary legacy. Please see our dedicated executor PDF below for more detailed information.

I would like to leave you a legacy. What should I put in my Will?

It is always very important for you to discuss wording with your solicitor before including it in a Will. They will probably suggest something along the lines of*

Residuary (a percentage of the estate):

"I leave to Yorkshire Wildlife Trust of 1 St George's Place, York, YO24 1GN - Charity Registration Number: 210807 - X% for its general purposes, and I direct that the receipt of the Treasurer or other duly authorised officer shall be a sufficient discharge to my executors."

Pecuniary (a fixed amount):

"I leave to Yorkshire Wildlife Trust of 1 St George's Place, York, YO24 1GN - Charity Registration Number: 210807 - the sum of £(x (amount in words)) for its general purposes, and I direct that the receipt of the Treasurer or other duly authorised officer shall be a sufficient discharge to my executors."

Restricted:

If you would like us to use your gift for a specific purpose or area, we suggest you use the following words:

"X% to Yorkshire Wildlife Trust with a request, but without imposing any legal binding obligation on Yorkshire Wildlife Trust, to use such monies to X."

We suggest this wording because, if for some reason it simply wasn't possible to use the gift as specified, then the bequest may fail. This is the case even if we could use the bequest in a way that meets the spirit of the giver's wishes but not the exact words.

**thanks to Remember a Charity for the wording*