

Advice on making a Will

Making a Will does not have to be expensive or complicated. A solicitor will help make sure that the wording of your will is precise and clear.

There are two main types of legacy, either of which may be left to individuals, charities or other bodies. Once you have decided who you want to leave something to, you may want to consider which type of legacy would be most appropriate.

Specific or Pecuniary Legacy - This is a gift of a fixed amount of money or a specific gift to your chosen beneficiary.

Residuary Legacy - This is the share of the remainder of your estate after all other payments and legacies have been made. This can be divided up between individuals, charities or organisations.

Some people also create a Reversionary Legacy that is left to a loved one for the duration of their lifetime after which it may be passed on to your chosen charity or organisation, or onto someone else.

If you already have a Will, the simplest way to make minor changes or additions is by making a Codicil. This is an instruction that is kept with your Will which your solicitor can help you draw up.

Advice on local giving

You may have some very clear ideas about who or what you may like to support. On the other hand you may appreciate some help in thinking through exactly how you could make a difference.

If you would like to discuss how we could help you help Somerset, or if you would like simply know more about the Somerset Community Foundation, please feel free to contact Justin Sargent or Julie Patterson, in the strictest confidence, on 01749 344 949.

For more information please visit our website

www.somersetcf.org.uk

Or contact:

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A Legacy for Somerset

What will yours be?



Writing a Will is a very important step for anyone to take. You can ensure that your loved ones are taken care of, and – if you wish – it is an opportunity to make a difference to your local community for years to come.

Your legacy to Somerset

Leaving a gift to the Somerset Community Foundation is a very simple and effective way to make a lasting impact to local communities in Somerset.

While the perception might be that Somerset is a prosperous county, there are many people of all ages and backgrounds in our communities suffering disadvantage and exclusion.

Hundreds of local charities and voluntary organisations, and thousands of unpaid volunteers, work closely with those most in need, responding to the most pressing issues in their community. Most are very small and struggle to raise sufficient funds.

The Foundation makes carefully targeted grants to local organisations, projects and initiatives led by local communities in response to their local needs.

If you leave a legacy to Somerset Community Foundation in your Will, you can be sure your gift will stay local, supporting the work of Somerset's charities and voluntary organisations...forever.

We are here to help you make a lasting difference.



Your gift to the Community

We have the flexibility to use your gift to support the whole community, or we can target particular areas or address the issues that matter most to you.

We welcome gifts of all sizes, but there are a number of options you may wish to consider:

Named Fund: leave a gift of £25,000 to set up a fund in the Foundation in the name of your choice. You can choose the areas and/or causes you want to benefit from your gift and we will ensure grants are awarded in accordance with your wishes.

Add to an existing Fund: you may wish to add to an existing Fund set up for a particular purpose or area of Somerset. Contact us for more details.

Somerset Giving Fund: a gift of any size could be added to our Somerset Giving Fund to give us the flexibility to support projects that meet the changing needs of our communities, today and forever:

Unrestricted Gift: An unrestricted gift will help us provide leadership in the community, for example commissioning independent research into local issues, or help us grow and develop for the long-term benefit of Somerset.

Your decision to make a gift to Somerset Community Foundation today, will help us plan for tomorrow, so that we can strengthen local communities for the future.

Any legacy you choose to leave to the Somerset Community Foundation will be free of Inheritance Tax.