

## **Leaving a legacy to Sulgrave Manor**

Leaving us a legacy is a fantastic way to support the work of **The Sulgrave Manor Trust**.

When you write your will, you can consider making gifts to a charity. The value of your gifts to charity will be deducted from your estate before Inheritance Tax is calculated, so this could reduce the amount of tax paid. And if you give more than 10% of your estate to charity the rate of Inheritance Tax is reduced from 40% to 36%. Your solicitor will be able to explain more about this and discuss how this may affect your estate and beneficiaries.

**We strongly recommend that you use a solicitor or other properly qualified will writer to make sure that your will is correctly drafted and signed.**

If you have already made a will you do not need to completely re-write it to include a gift to charity, you can make changes by way of a short document known as a codicil. Again we recommend using a solicitor or will writer to deal with this for you.

### **Tax**

If you are a **UK** taxpayer, any legacy you leave to the Sulgrave Manor Trust is free of Inheritance Tax as the Trust is a registered charity.

If you are a taxpayer in the **United States of America** bequests can be made via our non-profit 501(c)(3) organisation The Friends of Sulgrave Manor. All gifts made to the Friends of Sulgrave Manor are tax deductible for U.S. tax purposes to the extent allowed by law.

For taxpayers elsewhere overseas, we recommend that you contact your legal adviser for information on tax-efficient bequests.

### **In your will you can donate:**

- a fixed sum of money, which is known as a pecuniary gift.
- a particular item, for example a painting or a property, on the understanding that the Manor reserves the right to dispose of any such gifts in order to apply the proceeds to the Trust's purposes.
- a share of what is left in your estate after other gifts, taxes and expenses have been paid, which is known as a residuary legacy.
- a life interest in your estate (i.e. a right to income or to occupy a trust property) to an individual, and specify that, on their death the balance of your estate reverts to the Manor, which is known as a reversionary legacy.

If you would like to leave a gift in your will to the Sulgrave Manor Trust, you will need to have the following details:

### **The Sulgrave Manor Trust**

Registered address:

Sulgrave Manor,



Manor Road,  
Sulgrave,  
OX17 2SD  
Registered charity number: 1003839 (England and Wales)

### **How do I write my gift to the charity in my will?**

Whether making a new will or executing a codicil to change the terms of your current will we advise that you consult your legal adviser. To include a legacy to Sulgrave Manor Trust in your will, you might find the following wording helpful:

For a monetary legacy: "I give to The Sulgrave Manor Trust, of Sulgrave, Northamptonshire, OX17 2SD, United Kingdom, registered charity no. 1003839, the sum of £[insert amount] and I declare that a receipt from the Treasurer or the proper officer for the time being of the Trust shall be a good and sufficient discharge to my executors."

For a residuary legacy: "I give [specify %] of the residue of my real and personal estate to The Sulgrave Manor Trust, of Sulgrave, Northamptonshire, OX17 2SD, United Kingdom, registered charity no. 1003839, and I declare that a receipt from the Treasurer or the proper officer for the time being of the Trust shall be a good and sufficient discharge to my executors."

### **Want to get in touch?**

If you would like to talk to us about making a donation or leaving us a legacy in your will, please don't hesitate to get in touch with us. Please contact Chief Executive Officer, Alison Ray at [support@sulgravemanor.org.uk](mailto:support@sulgravemanor.org.uk).