



The importance of leaving a Legacy.

In the UK only 16% of all legacy gifts in wills are made to faith based organisations.

Why are legacy gifts so important to charities?

It's a common myth that only the rich and famous leave money to charity when they die. Thankfully 74% of the UK population support charities and when asked, 35% of people say they'd happily leave a gift in their will once family and friends had been provided for.

We know that to ensure families facing hardship and crisis can continue to enjoy breaks at The Jonas Centre, we need to build strong links between the local church and those willing to support this area of our work.

By remembering The Jonas Trust in your Will, you can help us to provide these subsidised holidays for many years to come.

Our promise to you is to make sure your gift will be spent in the most cost effective way, where it is needed most.

What type of gift should I make?

A *residuary gift* is where you choose to leave a share or the whole of whatever is left in your estate after all other payments and legacies have been made.

A *cash (or pecuniary) gift* is where you choose to make a gift of a fixed amount of money to The Jonas Centre. Remember that the value of pecuniary legacies will decrease over time, as the cost of living increases.

A *specific legacy* is where you choose to leave a particular asset to The Jonas Centre such as property, shares or personal possessions.

Legacies to charities, such as The Jonas Trust, are exempt from inheritance tax, so all your gift will go directly to The Jonas Centre.

How do I leave a legacy to The Jonas Trust?

To leave a legacy to The Jonas Trust you will either have to create a will or amend your existing will. These can sound like complicated and time consuming tasks, but we hope that by using the following information you will see it can be relatively easy and straight forward to leave your legacy to The Jonas Trust.

Before writing your will these are some of the things to think about.

Executors.

You will need to appoint one or more executors who can administer your estate and ensure that the wishes are carried out as per your will.

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We recommend that you have two executors and we suggest that you appoint one neutral family member or friend, and one professional such as a firm of solicitors or bank.

You should talk to your executors before appointing them in your will to ensure they are happy to take the role. Make sure you have their full names and addresses ready to include in your will.

Estimate your estate value.

You will need to make a list of all the things you own and estimate their value, then deduct any debts or liabilities to arrive at an estimated estate value, to see if your current will still reflects your situation and expresses your wishes. Your solicitor can then advise you if you need to make changes to your will, or if you need to make a new will.

Writing your will

When it comes to creating a will there are a couple of options you may consider: either make your will online or visit a solicitor.

Amending your will

It is important that you take a look at your will now and again to make sure that it still accurately reflects your wishes. Most people rarely review their wills and this can result in gifts being distributed in a way they did not intend. Another reason for reviewing your will could be that your named executor may no longer be the right person to act on your behalf.

You needn't tear up your old will and create a new one in order to make minor changes. For example you can add or remove a beneficiary or change the amount of someone's bequest by asking your solicitor to draft **an amendment to your will, known as a codicil.**

It is important that any such codicil is compatible with the original will and it is carried out correctly, so please consult with your solicitor over the precise wording for your codicil(s).

In the same manner as wills, codicils must be signed and witnessed. But whatever you do, don't alter the original copy of your will yourself. If you do, its validity can come into question.

Suggested wording for your will

To make a legacy to The Jonas Trust as part of your will, or to amend your existing will to include such a legacy, it may be helpful to take these guidelines on wording with you when you see your solicitor.

A residuary gift would be particularly appreciated as the value of your estate, and therefore the residue, will keep pace with inflation.

We suggest the following wording for a residuary bequest:

"I GIVE (e.g. a half share of) the residue of my estate to The Jonas Trust, Registered Charity number 1049167 of The Jonas Centre, Redmire, Leyburn, North Yorkshire, DL8 4EW for its

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charitable purposes. I further direct that the receipt of the Centre Director or other proper officer of The Jonas Trust for the time being shall be a full and sufficient discharge for the said legacy.”

Suggested wording for a codicil

“I (full name) of (address) DECLARE this to be a (e.g. first) codicil to my will dated (date in words).

1. I GIVE (e.g. a half share of) the residue of my estate to The Jonas Trust, Registered Charity number 1049167 of The Jonas Centre, Redmire, Leyburn, North Yorkshire, DL8 4EW for its charitable purposes. I further direct that the receipt of the Centre Director or other proper officer of The Jonas Trust for the time being shall be a full and sufficient discharge for the said legacy.

2. In all other respects I confirm my said will. IN WITNESS whereof I have hereunto set my hand this (date in words). SIGNED by the said (name) the Testator as and for a (e.g. First) codicil to his/her said will dated the (date) in the presence of us both being present at the same time who at his/her request in his/her presence and in the presence of each other have hereunto subscribed our names as witnesses:

(Signature of Testator and two Witnesses. In Scotland, one witness is required.)”

Please note: These suggestions are given for guidance only and do not constitute legal advice. We always recommend that you consult a Solicitor or qualified legal practitioner.

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