

Leave a legacy to Martha Trust  
and help our work to live on





Leaving a **gift to Martha** in your will, once you have provided for family and friends, is a simple thing to do.

But it can make the **world of difference**.

With your support we can help our residents achieve their **full potential**.

We can create a warm, loving and **supportive home** for them.

We can help them to **explore the world** around them and take an active role in it.

And we can bring a **smile to their faces**.

## What your gift would mean to Martha

By leaving a gift to Martha Trust, whatever the amount, you will be helping to transform the lives of people with profound physical and multiple learning disabilities.

- ▶ **£1,500** will pay for a touch screen computer, allowing our residents to get hands-on with technology
- ▶ **£3,000** will pay for a tilt table that improves the health of our residents and brings them up to eye level with the people around them
- ▶ **£5,000** will pay for an ability swing, giving our residents untold joy and bringing a smile to their faces
- ▶ **£15,000** will cover the costs of personalised physiotherapy programmes for all the residents in one of our homes for a full year



## Why make a will?

**Making a will is incredibly easy and vitally important.**

Without one, it will be left to the law to decide how your possessions should be divided. If you are not married or in a civil partnership there is no guarantee that your estate will go to your partner. And if you have dependent children, without a will you have no control over their care if anything should happen to you.

## Getting started

We strongly recommend you consult a solicitor or another professional advisor such as an accountant or bank manager who is qualified to make wills when making or changing your will. Not only does it cost less than you might think, but it will give you peace of mind and ensure that your wishes are carried out.

For information on solicitors contact the Law Society on [020 7242 1222](tel:02072421222) or visit [www.lawsociety.org.uk](http://www.lawsociety.org.uk)

Before you make a will you need to have a clear idea of what your estate is worth and how you would like it to be divided among the people and causes you care about.

So draw up a list of your assets, including any outstanding debts you might have, and make a rough estimate of the value of each.

Then decide who you would like to benefit from your estate and the value or share of your assets you would like them to have. Choose your executors and legal guardians, and leave clear instructions for the care of dependent relatives or pets, and your funeral wishes.

**Once your will is made, make sure it is kept up-to-date with the changes in your life.**

*“I’ve supported the wonderful work of Martha Trust for many years and because I understand how important legacy income is to charities, I’ve chosen to leave them a gift in my will.”*

Mrs Elizabeth Stone, Lancashire



## *Our Alex*

*Like most parents, John and Linda couldn't imagine that anyone would love their child as much as they did. So handing over the care of their daughter Alexandra was one of the hardest things they've ever done.*

*But from the moment she joined Martha Trust, Alexandra's family have watched her blossom into a confident and outgoing young woman who is full of life and who happily embraces each new experience.*



## Your options

If you choose to leave a gift to charity in your will you can either leave:

- ▶ **Pecuniary legacy** – a gift of a set amount of money
- ▶ **Residuary legacy** – a share or the remainder of your estate once friends and family have been provided for
- ▶ **Specific legacy** – a gift of an item of property, an antique or a piece of jewellery

If you choose to leave a gift to Martha Trust then the enclosed insert entitled '**Legacy clause wording**' might be helpful.

If you have already made your will then you can add a '**codicil**' which allows you to make changes without re-writing the entire document. Again, we would strongly recommend consulting a solicitor or another professional adviser such as an accountant or bank manager who is qualified to make wills when making or amending your will.

## It makes sense

**There are sound financial reasons for leaving a gift to charity.**

Not only is a legacy entirely free of inheritance tax, but if you were to leave more than 10% of the value of your estate to charity, then the government will reduce what inheritance tax you do pay by 10%.

Your solicitor will be able to explain the benefits and how they will apply to your circumstances in full.

*"I visited Martha Trust and saw their work and ethos for myself. I've been a supporter ever since and I wanted to make sure I remembered them in my will so their remarkable work can continue."*

Mrs O R Jones, Wirral

## FAQs

### Why make a will?

The only way to make sure that your wishes are carried out after your death is to make a will. It is a lot easier than you might think and while you will have to pay for professional advice, it is a small price for making sure your family and friends are taken care of and to leave a lasting legacy to your favourite charities.

### Do I need a solicitor?

When making or changing your will you should always seek professional advice from someone qualified such as a solicitor, accountant or bank manager.

### What if I already have a will?

It is possible to change your will using a codicil, without having to re-write the entire document. Talk to a professional advisor about the best way to do this.

### Why leave a gift to charity?

Charitable legacies are a vital source of income for charities, amounting to around £2 billion each year. By leaving a gift to charity in your will, after you have provided for friends and family, you are helping the work of that charity to live on.

### Are there any tax benefits?

A gift to charity is free of inheritance tax and there are additional benefits if your gift is worth more than 10% of the value of your estate. Ask your professional advisor to explain your tax situation to you.

### Why choose Martha Trust?

At Martha Trust we make every penny count. So a gift in your will, big or small, will have a huge impact on the people we care for.

### How do I leave a gift to Martha Trust?

If you choose to leave a gift to Martha Trust then thank you.

You will need to include our full name, registered charity number 1067885, details of the gift (whether it's a residuary, pecuniary or specific gift) and where applicable, the amount. You can use the sample wording in this leaflet or talk to your professional advisor about what you want to say.

## Make a difference

**A legacy can make a huge difference to the work of a charity like Martha Trust.**

If you are thinking about making or changing your will and you would like to leave a gift towards our work, then please call Barry O'Sullivan

on **01304 610448**

email [barry@marthatrust.org.uk](mailto:barry@marthatrust.org.uk)

or visit [www.marthatrust.org.uk/leavealegacy](http://www.marthatrust.org.uk/leavealegacy)

Martha Trust helps to transform the lives of people with profound disabilities. To find out more about the work of Martha visit [www.marthatrust.org.uk](http://www.marthatrust.org.uk)

On behalf of everyone who lives and works at Martha Trust – **thank you.**



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