

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**.

Whatever size gift you choose to leave, it will have a huge impact on our work. Just 1% of your estate can ensure we are transforming the lives of people with profound disabilities well into the future.

Your will reflects the person you are, the values you hold and shows the love to the people and causes you hold close to your heart. And leaving a gift to your favourite charity also comes with tax advantages.



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) (Monday to Friday from 09:00 to 17:00).

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 Stone



Charlotte

“Entrusting the care of our daughter, to another’s was one of the most daunting decisions we have ever made.

“My experience is that the complete Martha team are caring, thoughtful and loving and that they continuously strive to better and fulfil the lives of residents like Charlotte.

“I never realised what a huge positive difference it would make to the life that she is now really living. I now no longer take Charlotte along a path, I delight in following in her footsteps.

“Martha Trust really do work in partnership with me to drive improvements resulting in a better quality of life for Charlotte and all her friends that live in their care - one phenomenal, life changing example of this is that Charlotte now has a voice!”

Brett



“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 Jones

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.

Currently in the UK you can leave everything to your spouse tax-free, but after that each of us is subject to the inheritance tax threshold, currently standing at £325,000. Beyond this threshold anything we leave behind is subject to Inheritance tax at a rate of 40%.

That is, unless you leave it to an exempt body such as a UK-established charity. Charitable gifts left in wills are outside your estate before inheritance, enabling you to reduce the tax paid on your estate. You could even wipe it out entirely if you left everything over £325,000 to charity.

However, if you leave at least 10% of your estate, after any exemptions, to charity, this reduces the rate of any inheritance tax due from 40% to 36% - which could save thousands.

Find out more at www.gov.uk/inheritance-tax/

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 or expert legal advisor.

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 estate is worth more than the current inheritance tax threshold of £325,000. 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 support.

How do I leave a gift to Martha Trust?

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

Please include the following information:

Charity name	Martha Trust
Address	Homemead Lane, Hacklinge, Deal, Kent, CT14 0PG
Registered charity number	1067885

Make a difference

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

If you are thinking about leaving a gift in your will towards our work, and you have any questions or you'd just like to let us know, contact us on:

on 01304 610448

email fundraising@marthatrust.org.uk

or visit www.marthatrust.org.uk/transformlives

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

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



Martha Trust, Homestead Lane, Hacklinge, Deal, Kent CT14 0PG
T 01304 610448 F 01304 615462 E fundraising@marthatrust.org.uk
W www.marthatrust.org.uk

Registered Charity Number 1067885 Company Number 3467406