

# Legacy Giving



The countryside charity  
Peak District and  
South Yorkshire

One hundred years 1924 - 2024

# Why legacies matter

Legacies are critical to our survival as a charity. For a century we have been able to work to protect valuable landscapes because of the generosity of legacy givers. Some years, it is as much as 60% of our income.

Current statistics suggest that 75% of the UK population support charities during their lifetime, but only 7% include a gift to charity in their will.



# Why us

In 1924, the inspirational Sheffield-born Ethel Haythornthwaite (formerly Gallimore, nee Ward) founded the Sheffield Association for the Protection of Rural England. This went on to become the local branch of CPRE in 1927.

Ethel dedicated her life to protect the countryside in and around Sheffield. With the support of family and friends, she was instrumental in creating the UK's first Green Belt, around Sheffield, and its first national park – the Peak District.

A century on, the work never stops. Our precious countryside is still under threat and every year, a little more of it is lost. We continue to provide the vigilance and vigorous campaigning needed to protect the Peak District National Park and the countryside in South Yorkshire, as a source of inspiration, relaxation and recreation for millions of people, and to ensure its unique landscapes are safeguarded for the future.



# Protect the countryside you love

Leaving a charitable gift in your will to CPRE Peak District and South Yorkshire will help support local wildlife, natural green open spaces, rural life and the peace, tranquillity and outstanding natural beauty of the local landscapes, including the Peak District National Park. A legacy could help us prevent damage to the countryside and protect it from inappropriate development, such as the sprawl of urban developments, excessive road traffic and fracking.

## Specific projects

Whatever the size, every single legacy gift makes a real difference and we are immensely grateful for all that we receive. You are of course welcome to leave a legacy for any specific project or area you choose, but legacies free of any restrictions are particularly useful to us because they can be directed to where the need is greatest at the time.

# In Memoriam

Asking for donations instead of flowers at a funeral is a valuable and positive way to celebrate the life of a loved one. Friends and family know they're supporting a charity which will fight in their name to keep our countryside a beautiful and tranquil place for everyone to enjoy.

## Thank you

We won't be able to thank you in person when we receive your legacy so we'd like to thank you now! Thank you for helping us face the inevitable threats to our precious countryside in future years, for enabling us to continue our work, and for ensuring the beautiful landscapes you love now, will be protected for like-minded people to enjoy in the future.



CPRE Peak District and South Yorkshire is a registered charity, number 1094975.



## How to leave a gift in your will

If you die without a will (intestate) the law decides how your estate will be distributed. It may mean your money doesn't go where you want and you may pay more inheritance tax than you need to. The law says you must pay tax on 40% of any assets worth over £325,000 but there are many legal ways you can reduce this, including making a donation to charity.

**1. Choose your executor(s)** - the person who carries out the directions of your will. This should be a responsible and trusted friend or relative who can think clearly at a stressful time. You may choose a bank or solicitor, but they will charge a fee. Useful tip: list internet and other important passwords in a separate document to accompany your will, so your executor has access to all your online accounts.

**2. Decide who you want your estate to go to.** If you have dependent children, you should name a guardian(s) and allocate funds to ensure they're financially supported while growing up.

**3. Find a solicitor** - There's no legal requirement to use a solicitor to write your will but even small errors can cause big problems, so it's a good idea to get some expert advice - especially if your estate is valued at more than £325,000; or if you have a complicated family situation; or if you want to protect someone's interests after you're gone.

Useful tip: you can visit the 'Remember a Charity' website, which has lots of information about writing your will. They also have a directory of solicitors which you can search by postcode to find a contact near you.

### 4. Write your will

a) Already have a will? If you want to leave a gift to charity but you've already made a will, there are two ways to do it: the simplest is to write a new will. Once written, the new will voids any previous wills. The other way is to write a codicil, which is a document used to make simple changes to an existing will, like adding a charity, changing a gift amount or adding an executor. But when you cancel a will that contains a codicil, the codicil does not get cancelled automatically, so it may cause legal problems. To avoid this, make

sure that any new will clearly states that you are revoking all wills and codicils previously made.

b) Label the document 'Last Will and Testament'

(i) State your full name and address.

(ii) Testify that you are over the age of 18, are of sound mind and are not making the will under duress.

(iii) Write that this is your last will and testament, and that it revokes any previously made will or codicil.

(iv) Name your executor(s).

(v) Clearly identify your heirs.

(vi) Name the guardian for any minors or dependent children.

(vii) List your assets, including real estate, bank accounts, retirement accounts, stocks, bonds and tangible assets, then assign your heirs a percentage of your total assets.

(viii) Sign your will and ask a witness to sign it.

### 5. Leave a legacy to charity

There are three ways you can leave a legacy to CPRE Peak District and South Yorkshire:

a) Residuary legacy - this is a proportion of your estate and is usually shown as a percentage of what is left in your estate once all your dependants have been provided for and after all expenses, taxes and debts have been taken care of. This is the best way to leave a legacy, as it is not eroded by inflation and you should not have to alter it if your circumstances change.

b) Pecuniary legacy - this is a specific amount of money left to an individual or individuals or to a charity.

c) A specific gift - this is an item of financial value (which could include property or a shareholding), which can be sold to benefit your chosen individual or charity.

**Suggested wording** 'Subject to the payment of my debts, funeral and testamentary expenses, I give (the whole/insert percentage value) of my estate not otherwise disposed of by this my Will to CPRE Peak District and South Yorkshire, registered charity number 1094975, for the general purposes of the charity, and I declare that the receipt of their Treasurer or other proper officer shall be a full and sufficient discharge.'

# Thank you

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