

Helping people with Down's syndrome



Leaving a Gift in your Will

A lasting Legacy

You don't need to be rich and famous to make a positive difference to future generations of people with Down's syndrome. Any gift you make will help the Association to achieve its aim of helping individuals and families. Here are a few simple pointers to how you can achieve this goal by leaving a gift in your will.

Where do I start?

If you have not made a will, now's your chance! Without a will, after your death the law decides what happens to your estate and how it is distributed. This may mean that not everything you own will pass to your spouse. An unmarried partner has no automatic right to inherit. And, without a will, you lose the opportunity to benefit your favourite charities.

If you have made a will, but would like to make a gift to The Down's Syndrome Association (DSA), this can be done by means of a codicil – a sort of mini will.

Are there inheritance tax (IHT) advantages if I leave money to charities?

Giving assets to charity by will is one of the easiest ways to reduce your IHT liability, as all gifts to UK registered charities on death are completely exempt from IHT. A gift of £10,000 to a charity reduces your IHT bill by £4,000. You can be flexible – you can make cash gifts, or specific gifts of, say, a property or shares. You can give a charity a share in your estate, or the whole estate. All these gifts are wholly exempt from IHT.

Do I need a solicitor?

We think so. It is important to get the will (or codicil) absolutely right. In particular, there are formalities that have to be followed when you sign a will. If you get it wrong, the will could be invalid and the gift to DSA lost.

The wording of the gift is important too. We have included overleaf the correct wording for gifts to the Association.

Where can I find out more?

If you are looking for advice on how to draw up a will, or to prepare a trust for your family's benefit, please consult a solicitor. A good starting point to search if you do not have a solicitor is the Law Society website www.lawsociety.org.uk. The DSA's preferred solicitors for drawing up such documents is Lester Aldridge Tel: **01202 786122**, or e mail david.parkhouse@la-law.com.

For further information regarding legacies or leaving a gift in your will, please visit the Remember a Charity website www.rememberacharity.org.uk

For further information please contact Sharon Gordon-Roberts at the Down's Syndrome Association on 0333 1212 300 or sharon.gordon-roberts@downs-syndrome.org.uk

Act NOW and make that positive difference to future generations with Down's syndrome

How should I word the gifts in my will?

If you are giving a specific sum of money (a pecuniary legacy), you should use the following wording:

I give to the Down's Syndrome Association (Langdon Down Centre, 2A Langdon Park, Teddington, Middlesex, TW11 9PS) Charity Registration Number 1061474, the sum of £_____ (amount in words) for its general purposes and I direct that the receipt of the treasurer or other duly authorized officer shall be sufficient discharge to my executors.

If you wish to give the Association a share of your estate (a residuary bequest), you should use the following wording:

I give to the Down's Syndrome Association (Langdon Down Centre, 2A Langdon Park, Teddington, Middlesex, TW11 9PS) Charity Registration Number 1061474, (the proportion of residue) for its general purposes and I direct that the receipt of the treasurer or other duly authorized officer shall be sufficient discharge to my executors.

Example of how a legacy to the DSA helped....

In 2009, the DSA was very fortunate to receive a legacy for £32,000 from an individual who wanted to make a genuine difference. This was a very substantial donation towards the DSA's running costs and paid for the maintenance of our Information Helpline for two months. The individual decided that doing nothing to plan for the future of his family and especially his child with Down's syndrome was simply not an option, and therefore drew up his will several years in advance, making a provision to the DSA. His foresight has helped to ensure the DSA's financial stability in times of hardship, but most importantly that we can continue to offer a service to all who need it and improve our knowledge for future generations.