



National
Trust



A guide to making or
updating your will



A gift in your will looks after the places that matter to you

Gifts in wills help care for the places that really matter, from natural spaces and irreplaceable landscapes where wildlife can flourish, to unique buildings we can all enjoy exploring.

Our connection to these places is important. They're the coastal scenes that quicken our senses, the lush forests that put us in touch with our roots, and the great houses where we lose ourselves in bygone splendour.

The generations before us cared for these places, and now it's our turn to look after them for the next generation. Leaving a gift in your will to the National Trust makes this possible.

Making or updating a will is straightforward, and this guide is a simple introduction to the things you need to think about. We know leaving a gift in your will is a big decision that you'll want to think over carefully.

If you have any questions after reading this guide, or you'd like to talk anything through, please contact our Gifts in Wills Team – they're here to help.

Thank you for choosing to protect the places that make life special.



John Orna-Ornstein
Director of
Culture & Engagement



Mark Harold
Director of
Land & Nature

Why gifts in wills are so important

The National Trust has been looking after unique and inspiring places since 1895. It's a privilege and a great responsibility – and it requires significant funds. We now care for 780 miles of coastline, over 350 historic buildings and 250,000 hectares of countryside. Looking after these much-loved places costs more than £100 million a year. We simply couldn't do it without the gifts generous supporters leave us.

As a charity, the National Trust relies heavily on gifts in wills as they play a critical role in ensuring these special places are never lost. With membership covering just a third of our costs, we depend on the generosity of people who remember us in their wills. These gifts are one of the most important ways that people support our work. In fact, after membership, gifts in wills are our largest source of funding; without them, we'd be unable to care for many of our places.

A gift to the National Trust does so much. It helps us protect precious wildlife habitats for ever. Gifts help us plant native trees and shrubs, preserving the wild beauty of our favourite countryside. They help keep coastal views and walks open for everyone. They help preserve and protect the heritage at our hundreds of irreplaceable places, from historic houses to castles and forts.

As a charity we need your help keeping these places special for future generations. Any gift we receive, no matter how large or small, makes a great contribution to our ongoing conservation work.

Big or small, a gift can make a difference

A great example of how gifts in wills make a difference is the work at Wimpole. Designed as a sham castle and ruin, the Gothic Tower at Wimpole Estate in Cambridgeshire originally functioned as a Gothic eye-catcher – a place for the family to view their estate and entertain. But with a chequered history of repair and disrepair, the folly was suffering badly from the effects of the weather and deteriorating fast.

Thanks to a number of families who all left gifts to be used wherever the need is greatest in their wills, a skilled team of conservators and stonework specialists have carefully restored and repaired the building. They've also reinstated crenellations on top of the tower, replaced missing windows and doors and repaired the floors – restoring this intriguing building to its former 18th-century glory.



Right: The Gothic Tower on Johnson's Hill on the Wimpole Estate, Cambridgeshire.



A lifetime of delight

'For Christmas 1970 I bought life membership for my husband Peter – it cost just £50, but that represented a whole month's salary for me. As we travelled beautiful Britain, holidays included hours of pleasure at National Trust places. The deep peace and tranquillity of Fountains Abbey and Studley Royal are beyond belief in our hurried world. Polesden Lacey also became a favourite haven close to home.

I am so grateful to the National Trust – it's given us a lifetime of delight and countless treasured memories. Peter and I decided years ago to give the National Trust priority in our wills, I hope our contribution will give many future generations the same enjoyment in their lifetime.'

Rennie Fry

Above: Mrs Fry at Polesden Lacey, Surrey.

The different ways you can leave a gift

There are three main ways you can leave a gift in your will to the National Trust, all of which will play a critical role in helping protect special places for future generations.

Direct your support where the need is greatest

Most of the gifts we receive are designated for general purposes. This is helpful because it enables us to use the funds on the most urgent conservation work.

Support a specific place or area of our work

Alternatively, you might want to support a place that's full of special memories – a garden that lifts your spirits, a much-loved castle or your family's favourite beach. You can also support an aspect of our work you care deeply about – whether it's protecting wildlife habitats, caring for the coast or restoring precious art. If you have anything particular in mind, please call our Gifts in Wills Team.

Leaving property or objects to the National Trust

Every year, a number of people generously give their property, a specific object or a collection (such as paintings, books or furniture), usually with the intention that those items can be sold, and the resulting income can be used to support our conservation work. Sometimes we add properties to our holiday cottage or let portfolio, or we use historically appropriate objects to furnish them. It's exceptionally rare we can accept a property or objects for our permanent, publicly displayed collection. If you are considering leaving property or objects, please do get in touch with us – we'd be delighted to talk about the options available.

Did you know?

Leaving a gift to a charity like the National Trust could have tax advantages too. The following pages give you more information about leaving a gift in your will, including suggested wording to use when you come to writing your will. We always recommend you speak to a solicitor or professional adviser.

Joyful orchard planted the seed of an idea

After the Second World War, Olive and her husband Michael left London to enjoy the Dorset countryside. When Kingston Lacy country estate opened they fell in love with it, and in 2010 they left a gift in their will which funded the planting of an orchard there.

The couple's niece, Pearl James, and her husband Alec, planted the first saplings. Seeing the joy it gives to visitors, Pearl and Alec have been inspired to leave gifts to the National Trust in their wills too.

'They left the gift to the National Trust, but it's been an incredible gift to us, too.'

Pearl and Alec James



Left: A family exploring the sand dunes at Portstewart Strand, County Londonderry, Northern Ireland. **Above:** Pearl and Alec James.

Contact us

If you have any questions or would like to talk anything over, please don't hesitate to call our Gifts in Wills Team on **01793 817699**, or email legacies@nationaltrust.org.uk

Making a will – understanding the process and preparing for your meeting with a professional adviser

Making a will and keeping it up to date is the only way you can be sure your wishes will be taken care of properly in the future. It's straightforward putting a will together and doesn't need to be expensive.

At the National Trust we recommend getting professional advice from a solicitor. Do-it-yourself wills may seem inexpensive, but they're not always watertight, which can cause complications and lead to unexpected costs further down the line.

By appointing a professional adviser, like a solicitor, you can make sure your will is written properly and meets your unique requirements.

You can get started on making your will by filling out the form overleaf ready for your meeting with your adviser

Three things to consider once you've written your will:

Keep it safe

When you've written your will, make sure you keep the original in a safe place, like your bank or solicitor's office. We also recommend making a couple of copies – one for you to keep and one for you to give to your executor(s) (the National Trust can't hold original copies of wills).

Keep it up to date

Your circumstances are bound to change in the future, so you'll need to update it every now and then. You might move house, for example, or have new additions to your family. That's why it's worth reviewing your will every few years to make sure it stays up to date.

Changing your will

If you already have a will but are thinking about leaving a gift to a charity, it's very easy to make a simple addition. All you're likely to need is a simple legal document called a codicil. Just ask your adviser for more details.

Making a will and preparing for your meeting

Your name

Your address

Your partner's full name

Your partner's address

Please enter your children's details below:

Name:

Date of birth:

Address:

Name:

Date of birth:

Address:

Name:

Date of birth:

Address:

If you have children who are under the age of 18, who would you like to be their guardian (with legal responsibility for them until they turn 18), and what is their address?

Value of your property (£) (for help calculating this, please see the guidance included in our pack)

Who you'd like to provide for

Who you'd like to be your executor(s) (for help on the role of an executor, please see the guidance in our pack)

Working out what you've got to leave

Before you write a will, you need to work out the approximate value of your estate. Just make a list of what you own (your assets), and what you owe (your liabilities), using today's values. Then work out the value of your estate by taking away your liabilities from your assets. It may seem complicated, but your solicitor can help.

Calculating an approximate value of your estate:

What you own (assets)

Property or share of property (£)

Name:

Second home:

Other property and land:

Bank accounts (£)

Building Society accounts:

Bank accounts:

Other accounts:

Stocks and shares (£)

Investments, premium bonds:

National Savings:

Other:

Insurance and pensions (£)

Life insurance:

Endowments:

Pension death benefits:

Any lump sum death benefits:

Other:

Items of particular value (£)

Household contents including furniture and fittings:

Jewellery, valuable possessions:

Vehicles, eg, cars, caravans:

Other:

What you owe (liabilities)

Your liabilities (£)

Your mortgage:

Loans and overdrafts:

Your credit cards:

Credit or Hire Purchase agreements:

Other liabilities:

Approximate value of your estate (£)

Total assets:

Total liabilities:

Value of your estate:

(Subtracting what you owe from what you own will give an approximate value of your estate.)

Deciding who you want to provide for

This section will help you decide who you would like to include in your will and what you would like to leave them. Start by making a simple list of the family and friends you would like to benefit. You then need to decide what you would like to give each person, organisation or any charities and whether it should be a specific item, an amount of money or a percentage of your estate.

Quick guide to the language of wills

When you're writing a will, you may come across some words and phrases for the first time. Here's a quick guide to words used in this section:



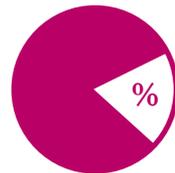
Pecuniary gift

A gift of a fixed sum of money.



Specific gift

A gift of a particular item, for example, a ring or a house.



Residuary gift

A share of whatever is left after all debts have been settled and other gifts made.

Deciding who you want to provide for:

Item, amount or share – pecuniary, specific or residuary gift

Who you want to leave it to – and their contact details

What you want to leave

Where it can be found

Item, amount or share – pecuniary, specific or residuary gift

Who you want to leave it to – and their contact details

What you want to leave

Where it can be found

Item, amount or share – pecuniary, specific or residuary gift

Who you want to leave it to – and their contact details

What you want to leave

Where it can be found

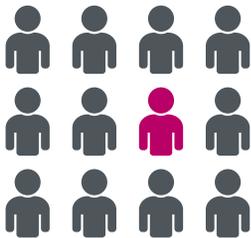
Item, amount or share – pecuniary, specific or residuary gift

Who you want to leave it to – and their contact details

What you want to leave

Where it can be found

Choosing your executors



Who to choose

The next step involves choosing your executors – people you trust who will carry out the instructions of your will. You might want to choose relatives, close friends or a solicitor. Make sure you ask people first though – being an executor is a serious obligation.



What they do

The executor has the legal authority and responsibility to administer the estate. An executor can also be a witness to your will, but only if they are not a beneficiary.



How many do I need?

If your arrangements are uncomplicated you may only need one executor, but you could have up to four. Most people tend to have two.

**Get started by filling out the
form on the back**

Choosing your executors:

Primary executor:

Name

Address

Email

Mobile

Landline

Relationship to you

Secondary executor:

Name

Address

Email

Mobile

Landline

Relationship to you

Leaving a gift to the National Trust: what you need to know

Q. Can I choose what my gift is spent on?

A. Yes you can. We welcome gifts that can be spent wherever the need is greatest, because they help us carry out the most urgent conservation work. However, we are also very happy to accept gifts for a particular place or use. That means you can choose precisely what your money is spent on. You might choose a property that's filled with cherished memories, or an area you really love, like the coastline, countryside or gardens.

Q. What's the difference between a pecuniary and a residuary gift?

A. You can leave a specific amount of money, which is known as a pecuniary gift, or a share of what's left over after all your wishes have been carried out, which is a residuary gift. Many people choose this latter option because the value of the gift won't go down over time.

Q. Can I minimise Inheritance Tax with a gift to the National Trust?

A. As a charity, any gift to us is free from Inheritance Tax. There are schemes which can reduce Inheritance Tax on the estate through charitable giving, but these are subject to change – please ask your adviser or visit gov.uk/inheritance-tax for more information.

Q. Can I give a copy of my signed will to anyone for safekeeping?

A. Make sure you keep the original in a safe place, like your bank or solicitor's office. It is also wise to tell your executor(s) where they can find the original. We recommend making a couple of copies of your will – one for you to keep and one for you to give to your executor(s). The National Trust can't hold original copies of wills. Make sure you review your will, so it still accurately reflects your wishes and takes account of recent events in your life, like moving house or the arrival of a new grandchild.

Q. Can I leave National Trust membership in my will?

A. Your life membership is personal to you, and can't be transferred to anyone else. Legacy gifts of life membership are not exempt from Inheritance Tax – they're treated as a gift to that person, not to the National Trust. However, you can leave money in your will for loved ones to buy their own life membership. This way, you can benefit the people you love as well as the National Trust.

Q. Can I leave a specific item to the National Trust?

A. Every year, a number of people generously give their property, a specific object or a collection (such as paintings, books or furniture), usually with the intention that those items can be sold, and the resulting proceeds go to supporting our conservation work.

Sometimes we add properties to our holiday cottage or let portfolio, or we use historically appropriate objects to furnish them.

It's exceptionally rare we can accept a property or objects for our permanent, publicly displayed collection. If you are considering leaving property or objects, please do contact our Gifts in Wills Team using the contact details opposite.

Q. Can I make the National Trust one of my executors?

A. Yes you can, but only in certain circumstances. If you'd like the National Trust to act as an executor, please get in touch with us so that we can provide further information.

Q. Do you need me to tell you that I've left a gift in my will to the National Trust?

A. You don't need to tell us, but if you feel comfortable sharing your intentions we'd love the chance to thank you. If you're interested, we can keep you up to date with how gifts are helping in our annual newsletter and invite you to special events.

Q. Can I leave a gift in my will to my local National Trust Supporter Group?

A. Yes you can. However, because these groups are not charities in their own right, the gift could incur Inheritance Tax and Corporation Tax for the National Trust Group. You might prefer to leave a gift to the National Trust as a tax-free gift and request that the group determines how the money should be spent. We'd be happy to suggest wording and discuss how to make a gift like this tax-free.

Q. If I want to include the National Trust in my will, do you have set wording I can use?

A. Yes, you'll find some guidance and suggested wording overleaf. We strongly recommend you use a qualified solicitor to ensure your wishes are recorded properly.

If you would like to talk to our Gifts in Wills Team, please call on 01793 817699 during office hours, or email legacies@nationaltrust.org.uk. Alternatively, you can write to us at Gifts in Wills Team, National Trust, Heelis, Kemble Drive, Swindon, Wiltshire SN2 2NA.

Suggested wording for the different ways you can make a gift in your will to the National Trust

A straightforward gift for general purposes:

Most of the gifts we receive are for general purposes, allowing us to use the funds where they're needed most. You can either leave a specific amount of money, which is known as a pecuniary gift, or a share of what's left over after all your wishes have been carried out, which is a residuary gift.

If you'd like to leave a pecuniary gift, you might find this wording helpful:

'I bequeath to the National Trust for Places of Historic Interest or Natural Beauty ('the Trust') of Heelis, Kemble Drive, Swindon, Wiltshire, SN2 2NA, Registered Charity No. 205846, the sum of £...'

If you'd like to leave a residuary gift:

'My Executors (these will be defined) shall divide the residue of my estate into equal shares and shall hold such shares as follows:

a) as to (specify number) such shares for the National Trust for Places of Historic Interest or Natural Beauty ('the Trust') of Heelis, Kemble Drive, Swindon, Wiltshire, SN2 2NA, Registered Charity No. 205846, absolutely;

b) as to (specify number) such shares for (legatee) of (address) absolutely.'

A gift towards a specific place or aspect of our work

'I bequeath to the National Trust for Places of Historic Interest or Natural Beauty ('the Trust') of Heelis, Kemble Drive, Swindon, Wiltshire, SN2 2NA, Registered Charity

No. 205846, [specify sum or share of residue] to be used by the Trust at its discretion for or toward the upkeep, maintenance or improvement of [name of your favourite property, region or area of our work, such as the coastline, Lake District etc].

Making a gift of life membership

'I bequeath to my Executors a sum, free of tax, sufficient to purchase life membership of the National Trust for Places of Historic Interest or Natural Beauty ('the Trust') of Heelis, Kemble Drive, Swindon, Wiltshire, SN2 2NA, Registered Charity No. 205846, for (specify name) and (specify name) at the life membership rate prevailing at the time the purchase is made.'

Making a gift of property or specific items

If you would like to leave us a gift of property or a specific item, please contact our Gifts in Wills Team at legacies@nationaltrust.org.uk or call 01793 817699.

Our work is extremely wide-ranging and stretches across the length and breadth of the country, so the possibilities are endless. If you have something particular in mind that you'd like to support with a gift, and you're not sure which wording to use, please get in touch with us. Thank you for thinking about supporting us in this way.

If you'd like this information in an alternative format, or if you have any questions or would like to talk anything over, please don't hesitate to call our Gifts in Wills Team on 01793 817699, or email legacies@nationaltrust.org.uk

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