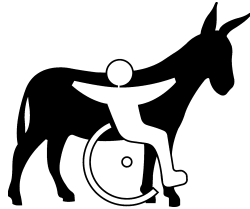


If we can be of any further help or if you would like more information then please write to us at:

**THE ELISABETH SVENDSEN
TRUST FOR CHILDREN
AND DONKEYS**



*A charity registered with the Charity Commission
for England & Wales No. 801070*

Sidmouth, Devon, EX10 0NU.

Tel: (01395) 578222 Fax: (01395) 579266

Legacy Dept. Tel: (01395) 573008

Mon - Fri 8.30 a.m. - 4.30 p.m. Other times use ANSAPHONE.

E-Mail: legacies@elisabethsvendsentrust.org.uk

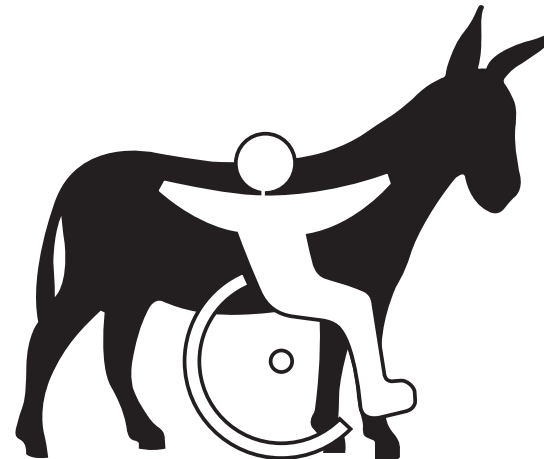
Web Site: www.elisabethsvendsentrust.org.uk

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Making a Will

*Giving to charity
A guide for all*

Making a Will is the ideal opportunity to let friends, relatives and charities know how much you appreciate and care for them and allows you to decide precisely what will happen to all the possessions and worldly goods you have accumulated throughout your life. You might be surprised to learn that there are laws which govern intestacy (when you die without making a Will) and it is not your nearest and dearest who decide where your property should go. Under Intestacy Rules only designated relatives or a legal spouse or partner can inherit from you.



The Elisabeth Svendsen Trust for Children and Donkeys (EST) brings together children with special needs and donkeys. We provide donkey-riding therapy to children with special needs and disabilities at purpose built Centres located around the country.


The children who attend the Centres have a wide range of disabilities; some have learning difficulties, others are physically disadvantaged or have behavioural problems, brain damage or sensory impairment.

We aim to bring enjoyment and pleasure into their lives and our work helps with their co-ordination and overall development, as well as giving them the satisfaction that comes with the achievement of learning riding skills.

We have riding therapy Centres in Sidmouth, Leeds, Birmingham, Manchester and Ivybridge and plan to have further Centres around the country when funding enables us to do so. As well as improvements in mobility, teachers who accompany the children have remarked on the changes in temperament as the children build trusting relationships with the gentle donkeys.

By remembering The Elisabeth Svendsen Trust for Children and Donkeys in your Will you can help us to ensure that our work will continue well into the future.

Thank you so much for thinking of us.



Dr E. D. Svendsen, M.B.E.
Founder



A RESIDUARY BEQUEST is the residue of your estate, or a share of the residue, after your debts have been settled and any legacies you leave to other people have been paid.

If you wish to leave all the residue of your estate to our charity the suggested form of wording is:

Subject to the payment of my funeral and testamentary expenses, I give, devise and bequeath the residue of all my real and personal property of whatsoever nature and wheresoever situate of or to which I shall be entitled at the date of my death to my Trustees upon trust for The Elisabeth Svendsen Trust for Children and Donkeys (a charity registered with the Charity Commission for England and Wales no. 801070) of Sidmouth, Devon, EX10 0NU absolutely to be applied for its general charitable purposes and I direct that the receipt of the Chief Executive or other proper officer for the time being of The Elisabeth Svendsen Trust for Children and Donkeys shall be sufficient discharge to my Trustees.

If you wish to leave a share of the residue of your estate to our charity your solicitor will explain how the bequest should be worded.



ADDING TO YOUR EXISTING WILL

If you have already made your Will, a bequest to our charity may be added to it by way of a Codicil.

If you are able to remember our charity in your Will it will ensure the future of our work. We depend entirely on our supporters to continue our worthwhile work and we make no charge to the schools, hospitals or parents whose children attend. Any bequest, no matter how small, will be gratefully received.

TO LEAVE A LEGACY TO OUR CHARITY



You should first decide the type of legacy you wish to leave. This can be a specific legacy, a pecuniary legacy or a residuary bequest. It is most helpful if bequests are made for the general charitable purposes of the charity as this means your gift can be spent where it is most needed at the time it is received.

A SPECIFIC LEGACY consists of a specific item of personal property. The suggested form of wording for a specific legacy is:



I give and bequeath unto The Elisabeth Svendsen Trust for Children and Donkeys, (a charity registered with the Charity Commission for England and Wales no. 801070), Sidmouth, Devon, EX10 0NU my (description) to be applied for its general charitable purposes and I declare that the receipt of the Chief Executive or other proper officer for the time being of The Elisabeth Svendsen Trust for Children and Donkeys shall be sufficient discharge to my Trustees.

A PECUNIARY LEGACY consists of a specified sum of money. The suggested form of wording for a pecuniary legacy is:



I give and bequeath unto The Elisabeth Svendsen Trust for Children and Donkeys, (a charity registered with the Charity Commission for England and Wales no. 801070), Sidmouth, Devon, EX10 0NU the sum of £ to be applied for its general charitable purposes and I declare that the receipt of the Chief Executive or other proper officer for the time being of The Elisabeth Svendsen Trust for Children and Donkeys shall be sufficient discharge to my Trustees.



WHY MAKE A WILL?

If you have no family and have not made a Will, your entire estate could pass to the Crown and be added to the Treasury's coffers. So while you might want your closest friend to have all your possessions, the law will not agree if there is no Will.



WHO SHOULD MAKE ONE?

Everyone should make a Will but it is particularly important for parents with young families to make a Will to ensure that their children's needs are safeguarded. It is not enough to guarantee that their financial future is secure, thought must also be given to who will bring them up if you and your partner die. Guardians can be appointed in your Will and your solicitor will help with details of Trust Funds.



CAN I DRAW IT UP MYSELF?

It is perfectly possible to draw up your own Will but even simple Wills must comply with legal formalities and, if you are not familiar with legal terminology, just one mistake could invalidate the whole document. The best advice we can give is that you use a solicitor to draw up the Will. It is worth the expense to have peace of mind knowing that your wishes cannot be misinterpreted.



HOW MUCH WILL IT COST?

The solicitor's charges will usually depend on the complexity of your affairs and the time taken to draw up your Will. Don't be afraid to ask for an estimate in advance. It may help to obtain estimates from various local firms before deciding which one to use - you will find a list of solicitors in your local Yellow Pages. There may even be a reduced cost if you and your spouse make matching Wills that leave the same property and possessions.

HOW CAN I SAVE COSTS?



To keep costs to a minimum the motto is - be prepared! Having all the relevant information to hand will save your solicitor time and save you money. Make a list of all your possessions such as property, furniture and jewellery. Add to this list any shares, insurance certificates or bonds you hold and details of where these documents are stored. Finally, include on the list the name, address and account number of any bank or building society with which you have an account.

FUNERAL ARRANGEMENTS



As many people never quite get round to discussing funeral arrangements with their loved ones, making a Will gives you the opportunity to make your wishes known. Make a note of these to be included in your Will. Strangely enough, the cost of a headstone or memorial is not regarded, by Law, as a Funeral Expense and it will make matters easier for your Executors if your wishes with regard to a headstone or memorial are also included in your Will.

BE SURE WHO WILL BENEFIT FROM YOUR WILL



Now write down the full names and addresses of all the people you wish to remember in your Will. Think carefully about precisely which specific gifts you wish to make and to whom.

LEAVING A GIFT TO CHARITIES



Anything left over after these specific gifts have been made forms the residue of your estate. You may wish to leave this, or part of it, to certain members of your family or friends or to a favourite charity.

This is often the one time in a person's life when they can afford to make a donation to causes which are dear to them. The cost of raising a family nowadays very often leaves little cash to spare and, later in life, retirement brings with it the need to conserve cash outgoings. If you are fortunate enough to have a property or a capital sum invested then provision can be made, by way of a legacy, for a significant donation to a charity which you have long admired.



THE TAX BENEFITS OF GIVING TO A REGISTERED CHARITY

A gift to a registered charity in a Will brings with it favourable tax exemptions and reliefs, with Inheritance Tax as an obvious example. As a general rule gifts to registered charities under the terms of a Will are wholly exempt from Inheritance Tax. If one or more charities are the only beneficiaries of the Will then no Inheritance Tax will be paid from your estate. In the case of a mixed residue, where part of the estate is given to relatives and friends, the liability to Inheritance Tax can be reduced by including a bequest to a registered charity.



HOW TO HELP RELATIONS, FRIENDS AND CHARITIES

If you would like to leave a bequest to charity but need to ensure that relatives or close friends are well provided for during their lifetimes there is a simple way to achieve both aims. Your solicitor can explain how someone can receive an income or other benefit from your estate for their lifetime and then, when this is no longer needed, the remainder can be passed to charity.



HOW MUCH TIME IS INVOLVED IN MAKING A WILL?

Making a Will usually involves two trips to your solicitor, a first visit to give your instructions and a second appointment to check the document which has been prepared and sign it.



WHAT IF I CHANGE MY MIND?

Many people put off making a Will in case they change their minds about legacies and bequests in later years.

However, once you have made a Will, the original contents can be changed or added to by means of a Codicil and will not involve re-writing your Will. The Codicil has to be signed and witnessed in the same way as the Will itself, although the witnesses do not have to be the same. The Codicil must be kept with, but not affixed to, your Will.