



Papworth Trust's guide to leaving a gift in your Will

**Your gift will change
a disabled person's
life**



Papworth Trust - there for disabled people since 1917

Papworth Trust has delivered vital support and opportunities to disabled people across East Anglia for over 100 years.

Our longevity reflects an ongoing reality: disabled people still experience significant disadvantage. Until this changes, the support, advocacy and services we offer will continue to play a vital role.



We provide support in **housing, care, work** and **day opportunities** because they are areas where disabled people experience the greatest disadvantage.



The Duke stops for a talk with a Bernhard Baron

We are proud of our extensive heritage, supporting disabled people to find work.



Our housing

We are a registered Social Housing provider with 664 safe, enabling and accessible homes for tenants. We are passionate about finding homes to meet the needs of disabled people.

Our work

We're proud of our extensive heritage of supporting disabled and disadvantaged people to find work.

Our care

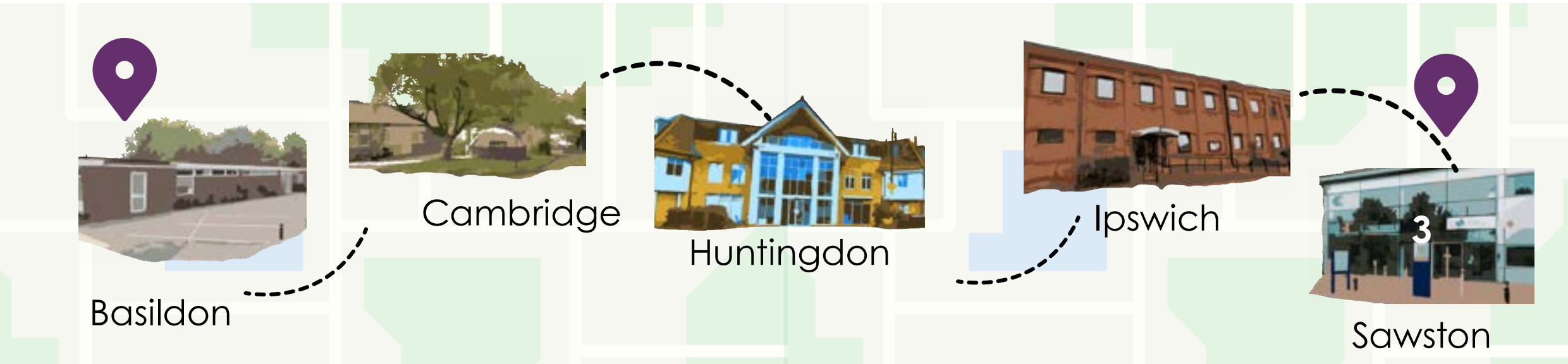
We provide compassionate and professional care that meets the needs of our disabled customers to empower independence and social inclusion.



Our day opportunities

These services exist to ensure that disabled people can acquire independent living skills, live healthy lives and reduce social isolation.

A gift in your Will will ensure we are able to continue delivering these vital services



Choose to leave a gift in your Will can change a disabled person's life



- **Help create long-term security** by funding accessible homes, specialist care, supported employment, and community programmes that may otherwise be difficult to sustain through day-to-day fundraising alone.



- **Support disabled people to have independence and dignity** through funding opportunities to work, learn skills, build friendships, and participate in their communities.



- **Strengthen communities, not just individuals**, by supporting inclusive housing, meaningful work, and social opportunities, to help build communities where disabled people are visible, valued, and connected rather than excluded.



A gift in you Will can help someone like Malvina...



“My name is Malvina, and I am a Papworth Trust tenant living in Luton.

Previously, I lived in a high-rise block of flats on the 13th floor. The flat was not suitable for a person in my condition because the corridors were too small to fit my wheelchair.

When I needed to go out, my friends would need to pick me up and carry me to the corridor to get me out of the house.

It was so bad. I was stuck in bed all of the time and, living on the 13th floor, all I could see was the clouds in the sky.

I felt like a prisoner in my own home, and my condition got worse. Living in that flat was no longer possible.

Then I moved into a property with Papworth Trust, and life got better. I've got a lovely house with a garden.

I can move around the house because the downstairs has enough space to turn in my wheelchair. I can go to the kitchen to see what my mum has cooked. I can go for a shower downstairs. Above all, I can spend time with my friends.”

It has been life-changing because I've got my little bit of independence.”

What you need to know about leaving a Will

Choosing to leave a gift in your Will is an extraordinary act. We wanted to start by saying “thank you for considering it.”

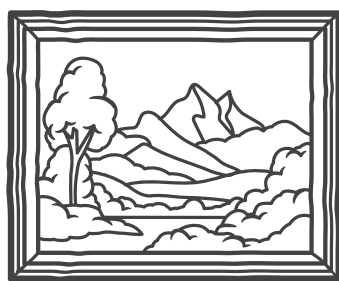
Each person's reason to leave a gift in their Will is different. You may want to support disabled people, say thank you to a cause that you care about, or create a legacy that will last into the future. A legacy gift allows you to support causes you care about after your death while potentially reducing the tax burden on your estate.

Decide what type of gifts you want to leave in your Will

You can leave different types of gifts in your Will, which are often called legacies.



• **A ‘cash’ (pecuniary) gift** – when you choose to leave a fixed sum of money from your estate, a specific amount to a family member or charity.



• **A specific gift** – when you choose to leave a specific item or possession, such as a house, a piece of jewellery or some artwork.



• **A share of your estate or ‘residuary’ gift** – when you choose to leave a share or percentage of your estate after debts, taxes and other gifts are paid.

Did you know legacy donations can reduce inheritance tax?

Inheritance Tax

Inheritance Tax has become a very real concern for many people, but did you know that leaving a gift to a charity in your Will can reduce the tax burden on your estate?

The following information is offered solely as a guide, and you should seek legal advice to understand how the rules will apply to you and your own circumstances.

What is Inheritance Tax?

Inheritance Tax is a tax that is put onto your estate (your property, money and possessions) when you have died. In the UK, this is 40% on the portion of the estate that exceeds a tax-free threshold of

£325,000 (this is known as the nil-rate band). The Executor of your Will (the trusted person you have named to carry out your wishes) needs to pay the Inheritance Tax before your estate can be distributed.



Can leaving a gift to charity reduce my Inheritance Tax eligibility?

Yes – UK registered charities are exempt from Inheritance Tax. Leaving a gift in your Will to Papworth Trust would reduce the taxable value of your estate.

For example, if you leave 10% or more of your net estate to Papworth Trust, the Inheritance Tax rate on the rest of your taxable estate may reduce from 40% to 36%.



Updating your existing Will

You may already have a Will in place. Making minor changes to your Will, like adding a new family member or leaving a gift to charity, can be done by completing a legal document called a **'Codicil'**. Whilst a bigger change may require you to write a **new Will**.



Please Note

This guide provides general information about how you can make or change your Will and how you can include Papworth Trust if you wish to do so. Please note that this guide is not legal advice.

Wills and inheritance laws vary across England, Wales, Scotland, and Northern Ireland, we suggest for legally binding advice, consult a qualified solicitor or regulated will writer before making or altering your Will.

Adding a gift to Papworth Trust in your Will

If you would like to include Papworth Trust in your Will then it's important that the right details are included. Our name, address and charity number should be correct to prevent confusion and delays in carrying out your wishes.

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Example:

“I give to Papworth Trust, Registered Charity Number 211234, of 1 Saxongate, Bradbury Place, Huntingdon, PE29 3RR, the residue (or X% share residue) of my estate and I direct that the proceeds may be used for the general purpose of Papworth Trust.”

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Papworth Trust is unable to offer legal advice, however you can find a solicitor in England or Wales by contacting the Law Society using, **www.lawsociety.org.uk** or call them on 020 7320 5650.





What can you expect from us

We at Papworth Trust promise to use your gift to make a lasting difference to the disabled people we support, now and in the future. We will be:

- **Honest, open and fair** – none of our staff will draft your Will or act as an executor to your Will. We will always encourage you to seek independent legal advice.
- **Respectful** – we understand and respect you may have loved family and friends who come first. We will not pressure you to leave a gift in your Will to Papworth Trust and recognise this is a deeply personal decision.
- **Confidential** – if you decide to leave us a gift in your Will, we would really like to thank you, but if you would prefer for this not to happen, we totally understand. All of your personal information will be treated in the strictest confidence.
- **Sensitive** – we will treat you, your family and friends with sensitivity and care.
- **Transparent** – we will be transparent about our work. We will use your gift responsibly, ensuring it will make the greatest impact on the lives of disabled people.

Have questions? Contact us

If you would like any more information or have any questions, please get in touch. Email us on

fundraising@papworthtrust.org.uk or call **01480 357200**

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Papworth Trust

1 Saxongate

Bradbury Place

Huntingdon

Cambridgeshire

PE29 3RR

Charity number: 211234

Please note – we cannot give you legal advice



Registered with
**FUNDRAISING
REGULATOR**