



Legacy Giving

LEAVING A GIFT IN YOUR WILL

INTERIM is committed to improving mental health and wellbeing, putting emphasis on providing counselling and psychotherapy services at the early to mid-stages of difficulty, thereby preventing long term chronic mental illness. We particularly want to develop psychotherapy theory that considers later life stages and inform, campaign for, highlight and educate people in the complex area of mental health.

We rely on money we raise and donations to support our work. By leaving us a legacy, however big or small, you will be making an important contribution to that.

Did you know? A third of people in the UK say they are happy to leave a gift to a charity in their Will but only 7% currently do

If you are interested in leaving us a gift in your Will the most important starting point is to make sure you have a Will! A Solicitor or legally qualified Will Writer can offer you advice and guidance on either making a Will or reviewing your existing one.

TYPES OF LEGACY

There are many different types of legacy but the two main ones are:

Residuary: a proportion of your estate. For example, if you donated the remaining value of your assets after you have provided for friends and family, this would be known as a residual legacy.

Pecuniary: a specific amount of money. For example, if you wanted to donate £20,000 to INTERIM, this would be called a pecuniary legacy.

TEMPLATE WORDING FOR WILLS

Model wording for a Residual Gift:

“I bequeath to INTERIM of 48, Narcissus Road, West Hampstead, NW6 1TH (A charity registered in England and Wales No. 1165114) (the whole/one half/two thirds or three quarters for example) of my residuary estate to be applied to the general purposes of the said Charity”

Model wording for a Pecuniary Gift:

“I bequeath to INTERIM of 48, Narcissus Road, West Hampstead, NW6 1TH (A charity registered in England and Wales No. 1165114) the sum of £.....,.....to be applied to the general purposes of the said Charity”

FREQUENTLY ASKED QUESTIONS

1. Can I keep my legacy private?

Yes, of course. You don't have to tell anyone what is in your Will. However, if you do decide to leave us a gift in your Will we would love to be able to thank you personally. So if you'd like to let us know please complete the Legacy Pledge form.

2. What happens if I needed to change my Will?

You can change the contents of your Will at any time. You can either create a completely new Will (which will state that it replaces any previous Wills) or, if it is just a small change you can complete a simple amendment document (called a codicil) which is attached to your original Will.

3. Would my legacy be taxed?

The good news about leaving a legacy is that it is deducted from your estate before calculating any inheritance tax that may be due. In addition, as there is no upper limit you can be as generous as you like, safe in the knowledge that your legacy will not be taxed.

Further questions:

Or if you have any further questions please either telephone INTERIM on 07827932167 and leave a message and we will call you back, or email us: enquires@weareinterim.com