

Legacy fact sheet



Leave Merchant Seamens War Memorial Society, trading as (Care Ashore) a legacy

A legacy or bequest is the most personal gift that you can give to us. Through a legacy you can make a direct and lasting contribution to Care Ashore, helping us to achieve our aim of providing sheltered housing with support, plus holidays to seafarers in need.

Why legacies are important to us

The charity offers a good support service to its residents to ensure they can live as independently as possible. We have support workers who can assist in maximising benefits, access grants and manage medication.

The generosity of our Friends and patrons over the years has contributed enormously to our success. The gift of a legacy would help us continue to provide support to seafarers in need.

Giving to a charity through a Will means that there is no inheritance tax or estate duty on the gift – so the charity will get the full benefit of it.

Different types of legacy

A legacy is the method you use to leave your property in your Will to a person or charity. There are several different types of legacy:

- Pecuniary:** when you leave a specified amount of money to a person or charity. You may want to request that it be linked to inflation in order for it to retain its value over the years.
- Residuary:** when you leave some or all of what is left over in your estate to a person or charity after all other legacies, debts, fees and other charges have been met. You can leave whole or part of the residue of your estate to Care Ashore. The value of a residuary legacy is not affected by inflation in the same way as a pecuniary legacy.
- Specific:** a legacy may not be a sum of money. Instead, you can leave assets such as property, stocks, shares, library collections, artefacts or other valuables.
- Contingent:** a gift in your Will that depends upon the occurrence of an event which may or may not happen, for example a bequest to a charity which applies only if other beneficiaries named in the Will die before you.

Charities Aid Foundation

If you have a Charities Aid Foundation account you can use this to make a gift to Care Ashore in your will by naming it as a charity you wish to support. This service is flexible because it allows you to change your list of beneficiaries at any time without needing to update your will. CAF will make sure your chosen charities get the money you've left to them. Or if you'd prefer, the legacy can go into a charitable trust, to be managed by your successors.

For more information call CAF on 01732 520 357 or visit their website www.cafonline.org

What next?

Consult your solicitor. If you wish to include a gift to Care Ashore, please let your solicitor know our registered charity number: 207500, and our address: Care Ashore, Springbok Estate, Alfold, Cranleigh, Surrey, GU6 8EX.

Wording for your Will

Residuary bequest

I give all or a ...% share (please specify) of the residue of my estate to Care Ashore, registered charity number: 207500 to be used for its general charitable purposes and I declare that the receipt of their treasurer or other proper officer shall be a full and sufficient discharge.

Pecuniary bequest

I give free of tax to Care Ashore, Registered charity number: 207500, the sum of £.... (please specify) to be used for its general charitable purposes and I declare that the receipt of their treasurer or other proper officer shall be a full and sufficient discharge.

Additional clause

We would also strongly recommend that you add the following clause after the bequest:
If at the date of my death a charity named as a beneficiary in this Will or in any Codicil to my Will has changed its name or amalgamated with or transferred its assets to another charity or body then my Executor(s) shall give effect to any gift made to such charity as if it had been made (in the first case) to the body in its changed name or (in the second place) to the body which results from such amalgamation or to which such transfer has been made.

Please let us know

If you have made or are going to make your Will and are leaving a legacy to Care Ashore, please let us know on the pledge form included. It won't commit you to anything and you may still change your Will at any time, but it will help us to plan ahead and we would also like to be able to thank you and keep you posted on our work.

Pledge Form



First Name(s)..... Surname:.....

Address.....

..... Postcode:.....

Telephone: Email:.....

I would like to remember Care Ashore:

- | | |
|--|---|
| <input type="checkbox"/> Residuary Bequest | <input type="checkbox"/> Pecuniary Bequest |
| <input type="checkbox"/> Specific Bequest | <input type="checkbox"/> Contingent Bequest |

(Please see fact sheet for details.)

I have already included a legacy to Care Ashore in my will.

Amount:.....

Type:.....

- I would like my legacy to remain anonymous.
 I am not ready to consider making a legacy at present.

Please return to Trevor Goacher, Chief Executive, Care Ashore, Springbok Estate, Alfold, Cranleigh, Surrey, GU6 8EX.

Tel: + 44 (0) 1403 752555
Email: T.Goacher@careashore.org