

# Legacy Giving

The Orchard Trust supports the involvement, independence and development of people with disabilities



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The Orchard Trust  
Valley Springs  
Central Lydbrook GL17 9PP  
01564 861137

[www.orchardtrust.org.uk](http://www.orchardtrust.org.uk) [fundraising@orchard-trust.org.uk](mailto:fundraising@orchard-trust.org.uk)

Charity number: 801122

## Introduction

Making a Will and keeping it up to date is very important - it puts you in control and is the only way you can be sure your loved ones and the causes you care about receive the gifts you intend for them.

Every legacy left to The Orchard Trust will make a vital difference to the current and future generations of people with disabilities we support. We will ensure your legacy is used appropriately and efficiently to change and enhance many lives.

We are a small charity but the huge difference we make is



increased by those who kindly support us. We are totally committed to supporting the involvement, independence and development of people with disabilities.

We want the people we help to have an exciting future to look forward to. One way of making sure this happens is through a legacy. If you ever decide to include a charity in your Will please remember The Orchard Trust.

## Why does The Orchard Trust need funds?



The Orchard Trust needs funds to develop its work providing a wide range of integrated services to meet the needs of people with disabilities in Gloucestershire and the surrounding areas thus ensuring these services to have a viable future.

All donations we receive are used to improve the lives of those that we support either in our homes or at the day services and therapy center at our Stowfield site.

Already we have been able to purchase specialist equipment such as ipads for assisted communication and other assistive technology which promotes independence such as switches that allow the user to open a door, turn on the television and even open and close their curtains.

## More about our users:

### Gabriel



Is a young man with complex, profound and multiple learning and physical disabilities who requires 1-1 support 24 hours a day. Gabriel does not have verbal communication but communicates in many other ways.

Gabriel loves going out and in particular attending the local church. He loves music, especially the singing in church and all social interaction.

Gabriel has a very infectious smile and is a popular member of the congregation. This engagement in the local community is important for Gabriel to enable him to experience different things, environments and people whilst fulfilling his spiritual needs which is important to him and his family.

Gabriel's keyworker says:

***“Gabe loves going out and meeting new people, he is such a charismatic character, he attracts people who wants to share his enjoyment of life”.***

## Dean

Dean has cerebral palsy with mild learning difficulties and has been part of the Trusts family for 14 years.

Dean loves answering the phone and has taken this role on within the home, and now moved on to answering the phones in the office, a particular job he enjoys amongst other tasks.



Dean also helps our admin assistants with their daily duties of photocopying, filing, meeting and greeting visitors and making tea!

This opportunity to work in the Trusts head office has promoted Dean's Independence and provided meaningful day time occupation, increased his self-esteem and self-worth through working alongside other people who are not his paid carers. He has learnt new skills, developed working relationships and gained social interaction within the local community.

**Dean says:**

***“I love my job and the people I work with, its brilliant!”***

# Six easy steps to making or changing your Will

## 1. Make a list of your assets

It can be very useful, and save time and money with your solicitor or legal advisor, to make a list of your assets and estimate their value.

## 2. Make a list of what you owe

You'll also need to consider any outstanding mortgage, loans or bills - as well as anything you're owed - in order to give yourself a clearer picture of the true value of your estate.



## 3. Decide who you want to benefit

List the people and organisations you wish to remember in your Will and think about how you'd like to divide your estate between them.



## 4. Decide what type of gifts you want to leave

Find more information below on the three main types of legacy you may want to leave.

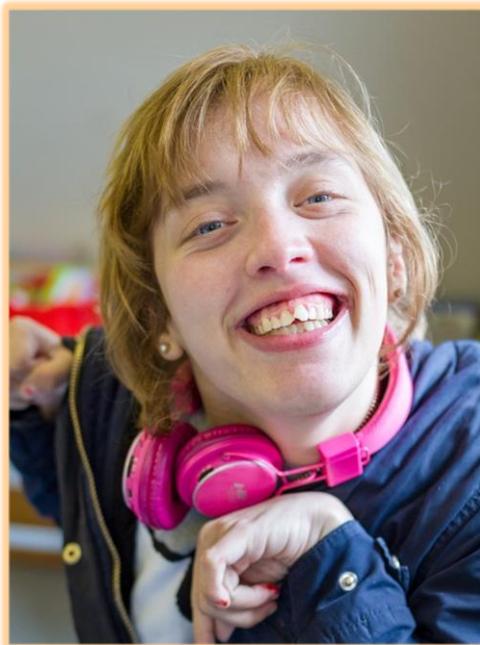
## 5. Choose your Executors and meet your solicitor

Your Will is very important to the future of loved ones and causes you care for. So we strongly recommend that you see a solicitor, or a member of the Institute of Professional Will Writers, when making or changing it.

You'll also need to choose executors, usually relatives, friends or legal advisers you trust, to carry out the terms of your Will.

## 6. Keep your Will in a safe place

It's an important document; so many people leave it in the care of their solicitor or legal adviser and keep their own copy in a safe place. Make sure your executors know how to find it.



# Types of Legacies

There are three main types of legacy you can leave to your loved ones and the causes you care about. Whichever you choose, whatever its size, your legacy to The Orchard Trust will help us to continue supporting disabled people.

## **1. Pecuniary legacy**

This is a gift of a fixed amount of money. If you have family or other people who you want to receive the bulk of your estate, you may prefer to leave us a pecuniary legacy. However, you should be aware that the effects of inflation will mean that the real value of the legacy could become less than you intended, unless you review your Will regularly.

## **2. Residuary legacy**

A percentage of the value of your estate once all other payments have been made, (e.g. outstanding debts, tax, pecuniary and specific legacies). This is a particularly effective way to remember a charity because it is expressed as a percentage and retains its value over time.



## **3. Specific legacy**

A gift of specific items such as personal possessions (antiques, furniture, jewellery), land, buildings or specified investments such as shares or the contents of a bank account.

This is a very brief summary; however your Solicitor / Will Writer will be able to provide any additional details to suit your own personal circumstances.

If you chose to leave a bequest in your Will for the benefit of The Orchard Trust please let us know so we can thank you and to ensure we do not write to you again about legacies!



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