



## Dartmoor Search & Rescue Team Plymouth

*Finding loved ones and saving lives in the communities  
of Plymouth, Dartmoor and surrounding areas*

Making a Will is something that is private and important for everyone – to be sure that your wishes will be reflected in what happens after you die. Legacies and bequests are a valuable source of income for charities such as ours.

After providing for your loved ones, please consider leaving a legacy to Dartmoor Search and Rescue Team Plymouth. Any size or kind of gift, large or small, helps pay for the equipment and training our volunteers need to stay safe during search and rescue operations and save more lives - today and into the future. Mountain Rescue teams such as ours throughout the country depend on such foresighted generosity.

If you are thinking of remembering us in your will, we would be very grateful if you could let us know so that we can plan for the future of the Team. (Download a copy of this form from the team website.) The contents of your Will are private but it would be helpful if you could tell us if you are thinking about leaving a gift to us in your Will. This also gives us an opportunity to thank you and invite you to see how your gift could be used by the Team.



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## **MAKING A WILL, AND ENSURING IT IS UP TO DATE**

The future cannot be predicted, and the only way to be sure your wishes are met and your loved ones and the causes you care about are looked after whatever happens, is to make a Will.

More information on all aspects of the Will making process are presented on the Citizen's Advice Bureaux website <https://www.citizensadvice.org.uk/family/death-and-wills/wills/>

## **HOW INHERITANCE TAX MAY AFFECT YOU AND THE BENEFITS OF LEAVING TO CHARITY**

Any gift, large or small, helps our volunteer rescuers to save lives. In addition to this, a gift to Dartmoor Search and Rescue Team Plymouth could also help reduce the inheritance tax (IHT) on your estate. Such gifts are deducted from your estate before IHT is calculated. So if these gifts reduce the value of your estate to below the threshold, it should no longer be liable for any IHT. This means many people can make a significant contribution to charities, such as Dartmoor Search and Rescue Team Plymouth with less of an effect on the value of what they leave to other beneficiaries.

A simple way to save IHT is by gift to charity. A surprising number of people leave the maximum they can give without paying tax to their family and the rest to a charity. Leaving a suitable amount to charity could result in a lower rate of Inheritance Tax payable on the rest of your estate.

The laws around Inheritance Tax are complex and professional advice should be taken if you believe Inheritance Tax will apply to your estate.

Check the free and impartial Money Advice Service website for more information on the tax benefits of giving to charity and the latest amounts involved:

<https://www.moneyadviceservice.org.uk/en/articles/the-tax-benefits-of-giving-to-charity>



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## **A SIMPLE PROCESS**

If you decide to leave a gift to Dartmoor Search and Rescue Team Plymouth, please show your solicitor the preferred wording below.

And that really is all there is to it – some simple steps that could make a huge difference to the future of the Team!

## **PREFERRED WORDING FOR SOLICITORS**

The following wordings show the key details that need to be included – we have checked these already with our legal adviser to make sure that they are correct.

### ***Gifts of Residue***

Some people prefer to leave a share of their estate to us after payment of gifts and expenses. That way, the amount you leave us will increase or decrease proportionately with the size of your estate.

If you plan to leave us a gift of residue then the wording we suggest you use is as follows:

Subject to the payment of my debts, funeral and testamentary expenses, I give the whole/\_\_\_\_\_ % of my estate not otherwise disposed of by this, my Will to Dartmoor Search and Rescue Team Plymouth (a charity registered in England and Wales, charity number 1106095) of Rescue Centre, 4 Devonshire Meadows, Roborough, Plymouth, Devon, PL6 7EZ for the general purposes of the Team and I declare that the receipt of its Treasurer or other proper officer shall be a full and sufficient discharge.

### ***Specific or Pecuniary Legacy***

Others know exactly how much they would like to leave us and would rather express that as a specific monetary sum. This helps provide you with certainty that will we receive that specific sum.

If you plan to leave us a specific legacy then the wording we suggest you use is as follows:

I give free of tax to Dartmoor Search and Rescue Team Plymouth (a charity registered in England and Wales, charity number 1106095) of Rescue Centre, 4 Devonshire



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Meadows, Roborough, Plymouth, Devon, PL6 7EZ the sum of £\_\_\_\_\_ for the general purposes of the Team and I declare that the receipt of its Treasurer or other proper officer shall be a full and sufficient discharge.

For wording of any other type of bequest, please ask your solicitor for professional legal advice.

None of this needs to be at all complicated and you can be sure that your bequest or legacy will be used carefully by to secure its work of search and rescue in and around Plymouth, Dartmoor and the surrounding areas for years to come.

## **ADDING A CODICIL TO YOUR WILL**

If you have already made a Will you can still help Dartmoor Search and Rescue Team Plymouth by adding a codicil to your existing Will.

Adding a codicil to your Will can be a simpler alternative to making a new Will but it is important that it is prepared correctly so as not to invalidate your Will. Seek professional advice if you are in any doubt about how best to put a codicil in place.



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## **FURTHER INFORMATION**

All gifts in Wills are important, regardless of size and we are grateful to all our Supporters for their continued donations, fundraising and gifts.

We advise you to consult with your solicitor or legal adviser before any amendments to your current will.

If you don't have a trusted adviser, we recommend you seek advice from a specialist in Wills such as a member of the Society of Trust and Estate Practitioners (STEP) (<http://www.step.org/member-directory>) or Solicitors for the Elderly (SFE) (<http://www.sfe.legal/public/search>).

To help you make a valid Will and if you would like more information about leaving a legacy to Dartmoor Search and Rescue Team Plymouth we have teamed up with GA Solicitors in Plymouth whose team includes a number of experienced advisers and members of STEP and SFE. They can offer you a free consultation and a competitive fixed fee quote to prepare your Will.

For more information, please contact: Matthew Rose, Associate, GA Solicitors, 25 Lockyer Street, Plymouth, Devon PL1 2QW  
01752 292566 or via: [Matthew.Rose@GAsolicitors.com](mailto:Matthew.Rose@GAsolicitors.com) [www.GAsolicitors.com](http://www.GAsolicitors.com)