



Can I save tax by leaving a legacy to The Blue Cross?

A gift to The Blue Cross in your Will does not attract inheritance tax, which may save tax your estate would otherwise have to pay. Further notes regarding inheritance tax on your estate can be found in our accompanying leaflet "Inheritance Tax". Tax is a complex area of law and we recommend you take specialist independent advice, particularly if you have substantial sums to gift to individuals and charities. Your advisor can assist in drafting your Will to ensure gifts will be transferred in the most tax efficient way and therefore give the greatest value to the individuals and charities concerned.

What type of legacy gift is best?

Any gift to The Blue Cross will make a difference and be gratefully received. Leaving a residuary legacy (a share or percentage of the residue of your estate once other gifts and payments have been made) means that you give a proportion of the value of your estate at death and so enables the gift to remain proportional to the value of your estate (whatever it may be worth).

Can I leave a legacy to be used for a specific area of work or project?

Legacies account for the majority of The Blue Cross' income meaning that it is most helpful for legacies to be left to our general purposes to ensure the running costs of our services are met. Suggested wording can be found in our accompanying leaflet "Your Information Sheet". It is preferable not to restrict the legacy to a specific project because our

services may vary over the years to adapt to meet the animal welfare needs of the time. However, if you would like to discuss any particular wishes you have regarding how your legacy could be used please contact a member of the Legacy Team on 0300 777 8240.

Should I make provision for my pets in my Will?

We always encourage people to consider making arrangements for the future care of any pets who may outlive them. Discuss and agree the provisions you would like to make with the person you would like to take care of your animals, your Executors and solicitor to ensure that your wishes are accurately recorded and will be practical to implement. If you have no-one to assist with the future care of your pets visit the legacies section of our website www.bluecross.org.uk or telephone our Legacy Team on 0300 777 8240 to find out more about The Blue Cross Pets into Care scheme and whether your animals can be registered to ensure they are provided for.

Can The Blue Cross act as Executor of my Will?

No, The Blue Cross does not have what is known as Trust Corporation Status and therefore should not be named as Executor. Although there is no need to do so, we suggest that you consider appointing a professional executor, such as a solicitor or bank, alongside a family member or friend. You should not appoint a professional executor without establishing in advance what charges, if any, he or she intends to impose for acting.

It is not always necessary for the professional executor to take an active role in the administration, however they can be on hand to provide advice and assistance to their Co-Executor when needed. We also recommend that you discuss your wishes with those people you would like to appoint in your Will to ensure that they are willing and able to take on the role of Executor.

Do I need to draw up a new Will?

If you do not wish to alter the contents of your existing Will other than to include a legacy to The Blue Cross you can amend your current Will by preparing a document called a Codicil. A Codicil needs to be signed and witnessed in accordance with the same legal formalities as a Will and we therefore recommend that you consult a solicitor to ensure that the Codicil is valid and your wishes will take effect. The suggested wording set out in our accompanying leaflet “Your Information Sheet” can be taken to your advisor for consideration if you decide to add a bequest to The Blue Cross by making a Codicil.

Is making a Will different in Scotland?

Yes, but it is still permissible to leave a legacy to The Blue Cross in a Scottish Will. As is the case in England and Wales, The Blue Cross should be correctly identified and the nature and extent of the legacy should be described in sufficient detail. Whilst our suggested wording found in our accompanying leaflet “Your Information Sheet” is still appropriate for use in Scottish Wills in relation to any legacy you wish to make to The Blue Cross,

we nonetheless strongly recommend that appropriate independent professional advice should always be sought when drawing up a Will in Scotland.

How do I choose a solicitor?

Details of solicitors in your area specialising in wills, probate and tax law work can be found in your Yellow Pages or by searching the Law Society website www.lawsociety.org.uk. Before deciding on a solicitor, we suggest that when contacting solicitors you ask how much they would charge for preparing your Will or Codicil and for dealing with your estate if appointed as Executor.

When receiving legacies, The Blue Cross Legacy Administration Team work closely with Executors to ensure that your wishes are honoured and that the amount received for our charitable work is maximised, including monitoring the level of fees charged by solicitors for acting in the administration of your estate.



If you need any information on making a Will, or amending your current one please call The Blue Cross Legacy Team on 0300 777 8240 or visit www.bluecross.org.uk