

Contact details

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Leaving money, land, property or a gift in your Will

Most of us would like to be certain that after our death, some or all of our money and property can be given to the causes we wish to help. When you die, if the value of your assets including your home exceeds the tax-free limit laid down by the government, your estate will be liable to pay Inheritance Tax on the balance at the rate of 40%.

The threshold for this tax is currently £325,000 (and the Government has announced that the threshold will remain frozen until at least 2026).

However, all donations to charity are completely exempt from Inheritance Tax; and if you leave

more than 10% of value of your estate to charity, the amount of tax due is reduced to 36% of the remaining value of your estate exceeding the threshold. Therefore, for anyone with assets exceeding the threshold, the amount that has to be paid to the tax man can be significantly reduced.

The Middle Marches Community Land Trust (the Trust), is a Society for the Benefit of the Community, and is recognised as a Charitable Trust by Her Majesty's Revenue & Customs, (Registration No. ZD07863).

Information contained in this leaflet is correct at the time of printing (September 2023)

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www.middlemarchescommunitylandtrust.org.uk

How to make a tax-effective donation to the Middle Marches Land Trust

If you are considering making or changing your will, please take legal advice. If you do decide to make a tax-effective donation to the Trust, the following suggested clauses may be of assistance to you and your solicitor:

- For a residuary bequest, i.e. what remains after specific bequests to your family and friends, the wording to use is:

“I give to the Middle Marches Community Land Trust all (or % share) of the residue of my estate and I declare that the receipt of the Honorary Treasurer or other proper officer of the Trust shall be sufficient discharge of the same.”

- For a specific legacy i.e. a fixed amount, ***a property, land or other specific item, the wording to use is:***

“I bequeath to the Middle Marches Community Land Trust the sum of £....., land / wildlife reserve known as or other specific item and I declare that the receipt of the Honorary Treasurer or other proper officer of the Trust shall be sufficient discharge for my Trustees”.

The Middle Marches Community Land Trust

The CLT is formed for the benefit of the community to operate in Shropshire, Herefordshire and Powys.

Since our inception in 2019 we have purchased, using funds raised by public appeals, three valuable sites for wildlife in the Shropshire Marches: Cudwell Meadow, Norbury Hill and most recently High Leasowes meadows.

The primary objectives of the Trust are to:

1. Protect, conserve, restore and enhance the environment through the purchase, lease and management of land.
2. Share information and learning through the encouragement of community involvement in sustaining and enhancing landscapes and participation in conferences and site visits.
3. Promote the biodiversity of the land through its sustainable management.
4. Act as a hub to share information, advice, skills and expertise for those seeking to conserve land.
5. Enable people to bequeath nature rich land to the Trust for environmental protection and conservation.

This is especially important to protect and preserve land that has been lovingly restored for Nature.

As a small independent Trust, we rely very much on gifts and bequests from members of the public which can make up a substantial part of our income.

Any donation or land you can give will help us secure a more wildlife friendly environment in the Middle Marches, one which is capable of inspiring and reinvigorating both local residents and visitors to the area.

Donations also greatly assist us in helping support a thriving local community which has good access to a healthy natural environment.

For further information on how you might help the Trust, or to discuss a potential legacy in confidence, please contact us (details on back page).

