

Legacies - leaving a lasting gift for the community.

Why Sussex Community Foundation?

Many of our supporters have been committed to Sussex for many years and don't want that commitment to end when they pass away. Although some people have a clear idea which charities they wish to support through their will, others may want to give back to their local community but are unsure exactly which charities to support. There may be a concern as to whether a smaller local charity will still be operating in the longer term.

Some may have considered giving a larger sum and so looked into setting up a charitable trust. They may have found that, for the amount they are planning to give, this option is relatively complicated and expensive.

Sussex Community Foundation provides a uniquely flexible range of options for people interested in leaving a permanent legacy for their local community. Donations are typically invested through our endowment fund and the income distributed each year as grants, meaning that the gift provides long-lasting benefit for generations to come.

The bequest can be left as an unrestricted gift to Sussex Community Foundation, enabling our trustees to direct funds towards the best local groups supporting the most immediate local needs. Alternatively, it can be directed towards specific local organisations, added to an existing fund at the Foundation, or used to establish a named fund. We can accept gifts of shares, property or investments, as well as cash donations.

Ways to give a legacy to Sussex Community Foundation

In summary, the options for leaving a legacy through us include:

Supporting Sussex Community Foundation

Simply naming Sussex Community Foundation as the beneficiary in a will means that we have the flexibility to support a wide variety of important local causes and respond to changing needs over time. Sussex Community Foundation will use the donation in the best and most effective way to improve lives in the local community.

Supporting an existing fund

Gifts of any size can be added to one of the funds already set up at Sussex Community Foundation, for example, benefiting a specific geographic area of Sussex or a particular social issue. The gift is invested alongside other donations, multiplying the overall benefit.

There are details of existing funds at www.sussexgiving.org.uk/named-funds



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For further information, please contact Stephen Chamberlain or Toni Darton on 01273 409440

Sussex Community Foundation, 15 Western Road, Lewes, East Sussex BN7 1RL
email: toni.darton@sussexgiving.org.uk / stephen.chamberlain@sussexgiving.org.uk
Website: www.sussexgiving.org.uk Registered Charity 1113226

Legacies

Supporting existing charities

If a donor wishes to support a number of local charities, a gift can be left to Sussex Community Foundation with instructions to distribute the donation between them, perhaps over a period of years. If any of the charities closes down in the meantime, we will ensure that the gift is redirected to another organisation with similar aims.

Creating a named fund.

Larger bequests can be used to establish a unique named fund at Sussex Community Foundation. Please see information sheet *Setting up a named fund* for full details. For example, with a gift of £50,000 or more, a named endowment fund can be set up that is invested and the income used to support the kind of causes/charities specified by the client.

The Arthur & Doreen Green Fund

Arthur Green has lived in Hove for a number of years and is now well into his retirement. In 2008, Arthur's wife, Doreen, died from cancer. Arthur is keen to leave a legacy that will provide long-term benefit for local charities and organisations, particularly those helping young people, old people and hospices.

After contacting Sussex Community Foundation and discussing the options available, Arthur decided that with the legacy he had inherited from his wife, he would set up the Arthur and Doreen Green Fund. As his donation attracted Gift Aid, the Fund also benefitted from the resulting tax claim. The Fund will increase again under the legacy Arthur has included in his Will.

"Doreen loved children but sadly we were not blessed with having children of our own. As the sole surviving member of my family, the family line would have ended eventually but, with the help of Sussex Community Foundation, that will now not happen. The Foundation has set up a fund in my name and that of my late wife. Not only will the fund be a permanent memorial to us both but, more importantly, the income generated by the fund will provide a contribution to the financial needs of some of the many worthy and deserving causes that exist throughout East and West Sussex."

Robert and Geraldine Bromley

Robert and Geraldine Bromley plan to leave a legacy to Sussex Community Foundation in their wills to benefit the market town of Rye and its surrounding villages. "We can name a number of couples who share our 'love at first sight' experience of our town. Across Sussex, there are thousands similarly dedicated to the town or village in which they reside," says Robert.

He and Geraldine have a shared interest in the built environment of Rye, its buildings, pavements and cobbled streets. "We will specify that the bequest we eventually leave will be to benefit those aspects of the town. We urge others who value their community's future to give serious thought to doing the same."



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Arthur & Doreen Green



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Legacies

Suggested wording for legacies

This is some suggested wording to use when a client would like to give a legacy to Sussex Community Foundation. Please contact us if you have a query or would like to talk through any particular client requirements.

Residuary legacy

“I give to Sussex Community Foundation, registered charity number 1113226 absolutely, all *[or the size of the Foundation’s share e.g. half]* the residue of my estate absolutely and I direct that:

(i) the assets comprising such residue may be used for the general purposes of Sussex Community Foundation, and

(ii) a receipt signed by a person for the time being authorised by the Trustees of Sussex Community Foundation shall be a good and sufficient discharge to my executors.”

Pecuniary or specific legacy

“I give to Sussex Community Foundation, registered charity number 1113226 absolutely, the sum of £..... *[or name of item/property for specific legacy]* and direct that it **(be paid into a designated fund to be called and):*

(i) may be used for the general purposes of Sussex Community Foundation and

(ii) a receipt signed by a person for the time being authorised by the Trustees of Sussex Community Foundation shall be a good and sufficient discharge to my executors.”

Leaving a legacy to set up a named fund

If your legacy has a value greater than £25,000, you may wish to establish a named endowment fund at Sussex Community Foundation. You may then specifically direct the causes to be supported and all future grants will be given in the name you choose. In such cases, we would suggest the following wording:

“I give to Sussex Community Foundation, registered charity number 1113226 absolutely, the *[...sum or name of property]* to be applied by the Foundation for its general charitable purposes and I direct that it be paid into a designated fund to be called *[.....]* and used for the purposes outlined in my last written communication to the Foundation subject to the articles of association and constitution of Sussex Community Foundation including the power of the Board of Trustees to modify any restriction or condition on the distribution of funds for any specified charitable purpose or to specified organisations, if in its sole judgement such restriction or condition becomes in effect unnecessary, incapable of fulfilment or inconsistent with the charitable needs of the area served by the Sussex Community Foundation.

A receipt signed by a person for the time being authorised by the Trustees of Sussex Community Foundation shall be a good and sufficient discharge to my executors.”



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