

# Edinburgh Jazz & Blues Festival

## Legacy Giving

A guide to leaving a gift in your Will

This guide contains some of the most frequently asked questions that we receive from our potential legators. If you have further questions, or would just like to contact us for a confidential chat, please call Gerard Mehigan, Development and Strategy Manager on +44 (0) 7477451517 or email [gerard@adjazz.co.uk](mailto:gerard@adjazz.co.uk)

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## Should I consult a solicitor?

Yes, we strongly advise that you consult your solicitor if you are thinking about creating a Will or leaving a legacy. You may already have a family solicitor. If not, ask a relative or friend to recommend one. If you are making your Will with your partner, you can make a 'mirror' (identical) Will if they are broadly the same. Before you meet with your solicitor for Will-making advice, it is a good idea to think about:

- the main things you own – like a house, shares, endowments, savings or life insurance policies – and roughly how much they are worth
- who your executor(s) will be
- what kinds of gifts you want to leave the people and charities you care about – pecuniary (fixed sum) or residuary (whatever is left over) legacies

The executors of your Will are the people who administer it when you are gone. They tell the beneficiaries about their gifts and settle any debts you owe. They also deal with Her Majesty's Revenue and Customs (HMRC) in the UK and/or the Office of the Revenue Commissioners in Ireland if necessary. You need to be able to trust them, and they need to be prepared to take on this responsibility. You can name a family member (including someone benefitting from your Will) or a friend. Alternatively, you can use a professional like an accountant or solicitor (who will normally require payment from your estate), or, if you prefer, a combination of relatives, friends and professionals.

## What type of gift can I leave?

There are three main types of gifts that you can leave in your Will, your solicitor can advise which of these is most appropriate for you. Most importantly, they will be able to ensure your Will is drafted in accordance with your wishes.

### **A Pecuniary Legacy**

This is a gift of a specified sum of money. Gifts of this nature are paid before the balance of your estate is distributed.

### **A Specific Legacy**

This is a gift of a specific named item of any nature, such as a property, car, or painting. Gifts of this nature are again paid before the balance of your estate is distributed and are generally paid free of the expenses of transfer.

### **A Residuary Legacy**

This is a gift of either all, or a specific proportion of, your remaining estate after payment of other legacies and expenses.

## Does it have to be a large gift to make a difference?

No. Each and every gift can make a positive difference to the Edinburgh Jazz & Blues Festival. Whilst some legacy gifts are large, the majority are not, but it is what these gifts can achieve together that makes them so crucial.

## Are there any tax benefits to leaving a gift in my Will?

Leaving a part of, or your entire estate to charity can reduce, and in some situations eliminate, the Inheritance Tax liability. If you leave something to charity in your Will, then it won't count towards the total taxable value of your estate. Your solicitor will be able to advise you on the tax benefits that are relevant to you.

## Can I choose how my gift is spent?

If you are leaving a legacy to the Edinburgh Jazz & Blues Festival you can request that your gift is directed to something specific. Legacy gifts are used by the EJBF where they will have the greatest impact. With this in mind, most legacy gifts are given without specific conditions, as we are not always able to identify where the funds will be most needed in the future. If you are considering leaving a Legacy, and would like to direct it towards something specific, we would ask that you please get in touch with us. We would be happy to chat through some options to ensure that your gift is used in accordance with your wishes.

## I would like to leave a legacy gift but I have already written my Will, do I need a new one?

No. Your solicitor can make the changes you wish to make to your original Will. Speak with your solicitor for further details.

## Do I need to bring anything with me when I meet my solicitor?

Yes. All you need is our name, address and charity number, your solicitor will do the rest.

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## Contact

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