

Leaving a charitable gift in your will

This information was prepared in September 2024, and may be affected by future legislation.

Each year at the English Folk Dance and Song Society we typically receive several gifts left by generous supporters in their wills. These sometimes amount to significant sums, although we value and welcome gifts of all sizes. They all make an important difference to the work we do.

Some gifts are left open to support our work as whole, and in other cases the donor expresses a wish that they should be used for specific activities.

Over the past decade or so, gifts in wills have meant that we could create a Dance Development Manager post; they have paid for the digitisation and cataloguing of seminal folk collections; and they have supported improvements to Cecil Sharp House including adding step-free access to all floors of the building, as well as restoring Kennedy Hall and its mural by Ivon Hitchens. Gifts in wills have also supported our day-to-day work in safeguarding, promoting and developing folk dance, music and song across England.

You can include the English Folk Dance and Song Society in your will by directing your gift to the **English Folk Dance and Song Society (EFDSS), registered charity number 305999**.

Making a will, and including a charitable gift within it, in need not be complicated or expensive. Do please note that we are not qualified to offer legal or financial advice tailored to your personal circumstances: you should consult an independent professional adviser, after reassuring yourself about their experience and credentials.

LEAVING A GIFT FOR GENERAL PURPOSES

If you choose to leave a gift for the English Folk Dance and Song Society's general purposes, we will use your gift where it is needed most.

Many people choose to leave a share of the **residue of their estate** – after taking care of their immediate loved ones, of course. A gift of even the final 1% could make a significant difference.

A suitable wording could be:

"I give all/a share of (please state fraction/percentage) of the residue of my estate absolutely to the English Folk Dance and Song Society of Cecil Sharp House, 2 Regent's Park Road, London NW1 7AY, Registered Charity Number 305999, to be applied for the general purposes of the English Folk Dance and Song Society and I direct that the receipt of a proper officer for the time being of the English Folk Dance and Song Society shall be a complete discharge to my Executors."

If you want to make straightforward **gift of a fixed amount**, a suggested wording is:

"I give to the English Folk Dance and Song Society of Cecil Sharp House, 2 Regent's Park Road, London, NW1 7AY, Registered Charity Number 305999, to be applied for the general purposes of the English Folk Dance and Song Society the sum of (amount in figures, amount in words) and I direct that the receipt of a proper officer for the time being of the English Folk Dance and Song Society shall be a complete discharge to my Executors."

LEAVING A GIFT FOR A SPECIFIC ASPECT OF OUR WORK

We will support any wishes that you have clearly stated in your will, as long as they are reasonably possible. Before finalising your will please do speak with us if you are able to do so, and with the assistance of your professional adviser if appropriate, so we can advise on whether we expect your wishes to be realistic.

One of the easiest ways to let us know how you would like us to use your gift is to include a letter with your will expressing your wishes. As it could be many years from now when we receive your gift, it is possible that your specified need will no longer exist: so it would be helpful if the clause in your will also allows us to use your donation *'for the general purposes of the English Folk Dance and Song Society'*.

INHERITANCE TAX CAN BE REDUCED BY MAKING A DONATION IN YOUR WILL

If your estate is expected to attract Inheritance Tax, you can reduce the rate of tax due by leaving 10% or more to charity.

The standard Inheritance Tax rate is 40%, which is charged on the part of your estate that's above the threshold. The standard threshold is £325,000, but if you give away your home to your children or grandchildren your threshold can increase to £500,000. Funds from your estate are used to pay Inheritance Tax.

You may qualify to pay Inheritance Tax at a reduced rate of 36% if you leave at least 10% of your net estate to charity.

For example:

- Your estate (after deductions have been made to cover any debts) is worth £850,000 and your tax-free threshold is £325,000.
- Inheritance Tax will be applied to £525,000 (£850,000 minus £325,000). So Inheritance Tax will be 40% of £525,000 = £210,000.
- If however you leave 10% of your estate to charity:
Your gift of £85,000 will go to the charity in full.
Inheritance Tax will now be 36% of £525,000 = £189,000 – the bill is reduced by £21,000.
Your £85,000 donation will cost your estate only £64,000.

HMRC publish details at gov.uk/donating-to-charity/leaving-gifts-to-charity-in-your-will.

We recommend that you speak with a specialist professional advisor for advice tailored to your personal circumstances.

PLEASE LET US KNOW

If you have decided to include the English Folk Dance and Song Society in your will,
THANK YOU!

We would love to know about you and your intentions. All information provided will be treated in the strictest confidence, and it is entirely up to you whether you wish to provide any details about your gift.

In particular, please contact us if you wish to place any restrictions on how your gift will be used.

WHAT NEXT?

To discuss your options, or simply for more information, please contact

- Katy Spicer, Chief Executive: telephone 020 7485 2206 or chief-executive@efdss.org
- or Peter Craik, Philanthropy Director (part-time): telephone 020 7052 3790 or donations@efdss.org

Alternatively, you can complete the form on the following page and send it back to us.

GIFT IN WILL NOTIFICATION

Title _____ First Name(s) _____

Surname _____

Address _____

_____ Post Code _____

Email _____

Telephone _____

Membership number (if applicable) _____

Please tick whichever boxes are appropriate:

- I have left a donation towards your work in my will.**
- I intend to leave a donation towards your work in my will.**
- I would like to speak to a member of staff.
Please contact me by phone / email (please delete as appropriate)
- I am happy for you to keep me informed by email / post**
(please delete as appropriate; it saves us costs if you choose to email)

Please return this form to:

Peter Craik, Philanthropy Director, English Folk Dance and Song Society

- Email donations@efdss.org
- Post: Cecil Sharp House, Regent's Park Road, London NW1 7AY
- Telephone: 020 7052 3790
(working part-time: if you get voicemail please leave a message to request a call back)

Data Protection:

The English Folk Dance and Song Society is registered with the Information Commissioner's Office (ICO). We promise that any information you give will be used for EFDSS purposes only, and will not be sold or otherwise shared for any third-party purposes with any outside people or organisations.

While we have made every effort to provide accurate information, there is no substitute for your taking professional advice about your particular circumstances. We cannot be held liable if you rely solely on the information we have provided.