

Leaving a Gift in Your Will

A legacy information pack for supporters of Improving Lives Plymouth



Improving Lives Plymouth

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Contents

- 1. A warm welcome
- 2. About Improving Lives Plymouth
- 3. Why gifts in Wills matter
- 4. How your gift could help
- 5. Types of legacy gifts
- 6. How to leave a gift in your Will
- 7. Suggested wording for your solicitor
- 8. Frequently asked questions
- 9. Our promise to legacy supporters
- 10. Letting us know about your gift
- 11. Contact us

Note: *This pack is for general information only and is not legal or financial advice. We recommend taking independent advice from a qualified solicitor or professional adviser when making or updating your Will.*

1. A warm welcome

Thank you for considering a gift in your Will to Improving Lives Plymouth. Leaving a legacy is a deeply personal decision, and we are very grateful that you are taking the time to find out more.

A gift in your Will can help ensure that local people continue to have access to support, connection and opportunities to improve their health and wellbeing for years to come.

Every legacy gift, whatever the size, can help us be there for people facing difficult times and can strengthen services that reduce isolation, improve mental and physical wellbeing, and support people to live more independent and fulfilling lives.

This pack explains how legacy giving works, how your gift could make a difference, and the practical steps to take if you choose to include Improving Lives Plymouth in your Will.

2. About Improving Lives Plymouth

Improving Lives Plymouth is a Plymouth based charity supporting people across our city to live healthier, happier and more connected lives.

We work alongside individuals, families and communities, offering practical support, wellbeing activities, advice, opportunities to connect, and services that help people build confidence, resilience and independence.

Our work is shaped by our values: listening, honesty, kindness, respect, and dignity. We aim to create welcoming, inclusive support that responds to what matters most to local people.

As a charity, we rely on a mix of income to deliver and grow our work. Gifts in Wills can help us plan ahead, respond to emerging needs, and invest in services and spaces that create lasting change in Plymouth.

Examples of the difference Improving Lives Plymouth makes

- Helping people improve their mental and physical wellbeing through accessible community-based support.
- Reducing isolation by creating welcoming spaces, activities, and opportunities to connect.
- Supporting people to build confidence, independence, and practical life skills.
- Working with local communities to improve outcomes, inclusion, and quality of life.

3. Why gifts in Wills matter

Legacy gifts can be transformational. They allow charities to think beyond the immediate and invest in the future.

For Improving Lives Plymouth, a gift in your Will could help us continue vital support for local people, improve community spaces, develop new opportunities, and strengthen the long-term sustainability of our work.

Some gifts help fund everyday services. Others can support a specific area that means something to you. Larger gifts may allow us to develop projects, improve facilities, or respond to needs that might otherwise go unmet.

Whatever you decide, your gift would become part of a legacy of kindness in Plymouth.

4. How your gift could help

Your gift could support one of the following areas, or where the need is greatest at the time it is received.

- Wellbeing support for people experiencing poor mental or physical health.
- Activities, groups, and community connections that reduce loneliness and isolation.
- Practical help enables people to stay independent and improve their daily lives.
- Accessible spaces, equipment and building improvements that make our services more welcoming and inclusive.
- Innovation and development, helping us pilot new approaches and respond to changing local needs.
- General charitable purposes, giving us flexibility to direct funds where they can have the greatest impact.

Optional wording if you wish to direct your gift

If there is a particular part of our work you care about, you may wish to express a preference. We are happy to discuss this. We usually recommend broad wording so that your gift can still be used effectively if services change over time.

5. Types of legacy gifts

There are several ways to leave a gift in your Will:

Residuary gift

A share of your estate, or the remainder after gifts to loved ones; taxes, debts and expenses have been paid. Many people choose this option because it keeps pace with inflation over time.

Pecuniary gift

A fixed sum of money. If you choose this option, you may wish to review your Will from time to time, as inflation can reduce the future value of a fixed amount.

Specific gift

A particular item, such as property, land, shares, investments, jewelry or another asset.

Contingent gift

A gift that takes effect only in certain circumstances, for example if other named beneficiaries die before you.

6. How to leave a gift in your Will

1. Decide what matters most to you. You may wish to provide for your family and friends first, then consider whether you would also like to support a cause that matters to you.
2. Think about the type of gift you would like to leave. A residuary gift, a fixed sum, or a specific gift may each suit different circumstances.
3. Speak to a solicitor or qualified Will-writing professional. They can help make sure your wishes are clearly and legally recorded.
4. Share our charity details and the suggested wording in this pack with your adviser.
5. Review your Will occasionally, especially after major life events such as marriage, divorce, the birth of children or grandchildren, moving house, or changes to your financial circumstances.

If you already have a Will

You may not need to write a new Will. A solicitor can often update an existing Will by adding a codicil, although many advisers now prefer preparing a new Will to reduce the risk of confusion.

7. Suggested wording for your solicitor

Please ask your solicitor to check the final wording, so it suits your personal circumstances and complies with current legal requirements.

Charity details

Charity name	Improving Lives Plymouth
Type of charity	Registered charity
Registered address	Ernest English House, Buckwell Street, Plymouth PL1 2DA
Charity number	1066776

Suggested wording for a residuary gift

I give [all / % share] of the residue of my estate absolutely to Improving Lives Plymouth of Ernest English House, Buckwell Street, Plymouth PL1 2DA, Registered Charity No. [insert charity number], for its general charitable purposes, and the receipt of the proper officer for the time being shall be a full and sufficient discharge to my executors.

Suggested wording for a pecuniary gift

I give the sum of £[amount] free of tax to Improving Lives Plymouth of Ernest English House, Buckwell Street, Plymouth PL1 2DA, Registered Charity No. [insert charity number], for its general charitable purposes, and the receipt of the proper officer for the time shall be a full and sufficient discharge to my executors.

Suggested wording for a specific gift

I give [description of item / asset] to Improving Lives Plymouth of Ernest English House, Buckwell Street, Plymouth PL1 2DA, Registered Charity No. [insert charity number], for its general charitable purposes, and the receipt of the proper officer for the time shall be a full and sufficient discharge to my executors.

If you want your gift used for a preferred purpose

If you would like your gift to support a particular area of our work, we recommend speaking to us first so that the wording is practical and future-proof. Broad wording can help ensure your gift remains usable if services change over time.

8. Frequently asked questions

Do I have to be wealthy to leave a gift in my Will?

No. Any gift can make a difference. Many supporters choose to leave a small percentage of their estate or a modest, fixed sum.

Can I look after my family first?

Yes. Most people choose to provide for loved ones first and then leave a gift to charity if they can do so.

Can I change my mind later?

Yes. Your Will can usually be updated at any time, provided you have the legal capacity to do so and follow the proper process.

Do I need to tell you if I have left a gift?

No, but if you would like to let us know, it helps us thank you and understand your wishes. Any information you share will be treated sensitively.

Can I leave a gift for a specific project?

Potentially, yes. We are happy to discuss this. In many cases, unrestricted gifts are especially valuable because they allow us to respond to the greatest need.

Will my gift be subject to Inheritance Tax?

Gifts to UK charities are usually exempt from Inheritance Tax, but tax rules can change and depend on individual circumstances. Please seek independent professional advice.

What if Improving Lives Plymouth changes in the future?

We recommend wording that allows your gift to be used for our general charitable purposes. This helps make sure the gift can still be applied effectively if our services evolve.

Can I remain anonymous?

Yes. If you tell us about your gift, we will respect your preferences about privacy and recognition.

9. Our promise to legacy supporters

If you choose to leave a gift in your Will to Improving Lives Plymouth, we promise to:

- Treat you, your family, and your wishes with sensitivity, respect, and gratitude.
- Never pressure you into making a decision.
- Understand that your loved ones come first.
- Use your gift responsibly to support our charitable purposes.
- Be open and honest in our communications with you.
- Respect your privacy and any wish to remain anonymous.
- Encourage you to take independent legal and financial advice.

10. Letting us know about your gift

You do not have to tell us if you decide to leave a gift in your Will, but many supporters choose to do so.

If you let us know, we can thank you properly and, if you wish, keep you updated about our work. It can also help us understand whether you have any preferences that you would like us to be aware of.

Any information you share with us will be handled with care and in line with our privacy policies.

11. Contact us

If you would like to talk confidentially about leaving a gift in your Will, please contact us. We would be very pleased to help with general information, although we cannot provide **legal** or **financial advice**.

Improving Lives Plymouth

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Website: [Improving Lives Plymouth Wellbeing Hub](#)

Thank you for considering a legacy gift. Your kindness could help improve lives in Plymouth for generations to come.