Proposed Wording for your Legacy

The following wording covers a gift of a share of the estate:

"I give to the Somerset Archaeological & Natural History Society (hereinafter called SANHS), a charity registered in England and Wales no. 201929, of Somerset Heritage Centre, Brunel Way, Taunton, Somerset. TA2 6SF or to whatever registered charity may succeed it, the residue (or % .....share of the residue) of my estate absolutely and I direct that the proceeds may be used for the general purposes of SANHS or that it is divided between the .....Fund %..... and the remainder %..... for the general purposes of the Society. A receipt signed by a person for the time being authorised by the Board of SANHS shall be a good and sufficient discharge to my executors."

A fixed sum, or pecuniary legacy, can be left using the following suggested wording:

"I give to the Somerset Archaeological and Natural History Society (hereinafter called SANHS), a charity registered in England and Wales no. 201929, of Somerset Heritage Centre, Brunel Way, Taunton, Somerset. TA2 6SF, or to whatever registered charity may succeed it, the sum of £..... and I direct that the proceeds may be used for the general purposes of SANHS or that it is divided between the .....Fund %..... and the remainder %..... for the general purposes of the Society. A receipt signed by a person for the time being authorised by the Board of SANHS shall be a good and sufficient discharge to my executors."

Note

Legacies to a registered charity are exempt from inheritance tax. In certain circumstances, especially with larger estates, a charitable bequest can be a useful way to avoid the payment of inheritance tax on all or part of your estate.

Please take your own legal advice when using the proposed wording above.

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SOMERSET ARCHAEOLOGICAL & NATURAL HISTORY SOCIETY

Gifts & Legacies

A plate from the William De Morgan collection

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Somerset Archaeological & Natural History Society is a Registered Charity in England & Wales No. 201929

Gifts and Legacies to the Somerset Archaeological and Natural History Society

The Society has, over its 170 year history, been entrusted with the privilege and responsibility of looking after properties such as Taunton Castle, the Norman Gardens, Castle House, the Wyndham Hall and a museum collection of national importance now amounting to over a million individual items.

Within the collection is a Bronze Age gold torque, Anglo-Saxon manuscripts, material excavated from the world-famous Iron Age Somerset Lake Villages, a wealth of paintings, items of clothing and other items relating to the life and interests of Somerset residents of more recent centuries. There is also a most important library of over 30,000 items comprising books, collections of prints, church and local registers and also an important natural history collection reflecting the interest of the 18th and 19th century naturalists in all aspects of their own county, country and the new countries being explored. Access to the collections for academic and local studies is encouraged and ongoing.

As a charity the Society is dependent on volunteers, a voluntary income and the generosity of the people who remember the Society with a gift or a legacy in their will, which is so important, and for which the Society is most grateful. Without such funding the aims and objectives of the Society in caring for Somerset's Heritage becomes more and more difficult.

Please consider a gift to the Society, no matter how large or small, as it will help to ensure the collections and properties are maintained for the interest and use of future generations. Although the most beneficial gift is one that is an unrestricted, or general gift, as it allows the Society to use the gift wherever the need is greatest, the Society also administers several funds to enhance or further the knowledge of Somerset to which a donation could be directed at the donors wish. They include:

- *The Museum Collections Fund:* for the very important maintenance of items in the Society's collections.
- *The Natural Sciences (Pat Hill-Cottingham Memorial) Fund:* for research into the geological and biological sciences of the county.
- *The Maltwood Fund:* designated for research into the archaeology and history of Somerset.
- *The Desmond Williams Fund:* for fieldwork and research into the vernacular architecture of Somerset.
- *The Tite Fund:* for maintaining the library.
- *The Harald St.George Gray Fund:* to encourage archaeological research and fieldwork in Somerset.
- *The Murless Fund:* to support the preparation of Heritage materials for display through digital media.

Further details of these funds are available on the SANHS web site at www.sanhs.org or from the Society office. A donor could also divide a gift or legacy between their specified fund and discretionary use by the Society. *Details of recent grants given from the funds are available from the SANHS web site.*

Should you wish the Society to benefit from a gift or legacy we recommend you speak with a solicitor or professional advisor. We suggest, overleaf, a suitable form of wording in order to include the Somerset Archaeological and Natural History Society in your will.