



**Help save the
Great Western Heritage
for generations to come
A Legacy Guide**

A legacy to the Great Western Society

The Great Western Society is a registered charity (No. 272616) which was formed in 1961 to preserve the spirit and style of the Great Western Railway. Since its founding the GWS has built up a comprehensive Collection of locomotive types, rolling stock and other artefacts covering the history of the GWR, which is based at the authentic Great Western locomotive running shed built at Didcot, Oxfordshire in the early 1930s. Today this is known as the Didcot Railway Centre.

The GWS is a voluntary organisation and the 'Great Western' Collection assembled at Didcot is the result of many thousands of hours work by Society members, supported by gifts and donations. However, much more still needs to be done to build upon what has already been achieved and improve the collection.

The Great Western Society is always grateful for any gifts or legacies received, however small. These are used to fund:

- major projects
- development of Didcot Railway Centre
- improvement of the 'Great Western' Collection.

Legacies are **not** spent on administration.

Over the years the Great Western Society has received a number of legacies/bequests and has been asked to provide suitable wording from members who wish to make bequests. This brochure has been prepared to assist those who may wish to make such bequests.

Making a Will is the most secure way of planning for the future. With

a carefully considered Will, you can make a lasting gift towards a cause you believe in. And making a Will is not difficult or time-consuming, it just requires care and thought. If you would like professional advice when you are considering how to leave a future gift to the Society, we are happy to offer help and assistance and you should write in the first instance to the Secretary of the Great Western Society at Didcot Railway Centre, where your enquiry will be dealt with in the strictest confidence.

You can help us further by using our recommended wording when discussing details of your Will with your solicitor or legal adviser. We prefer you to leave your legacy in the first instance to the Great Western Society, with an added rider expressing any specific wish.

Although it is our policy to honour specific bequests, if for some reason we are unable to do so, using the correct wording will prevent the whole legacy from being invalidated.

However, if you're not happy with any of the examples given, please feel free to contact us to discuss your wishes in more detail.



General purpose bequests

General purpose gifts and legacies are always welcome, as the requirements of the Society vary from year to year.

Example wording for general purposes:

Pecuniary

I give free of tax to the Great Western Society Limited (Registered Charity No. 272616) of Didcot Railway Centre, Didcot, Oxfordshire OX11 7NJ, the sum of £..... for the general purposes of the GWS and I declare that the receipt of their Treasurer or other proper officer shall be full and sufficient discharge.

Residue

Subject to the payment of my debts and testamentary expenses I give the whole of my estate not otherwise disposed of by this my Will to the Great Western Society Limited (Registered Charity No. 272616) of Didcot Railway Centre, Didcot, Oxfordshire OX11 7NJ, for the general purposes of the GWS and I declare that the receipt of their Treasurer or other proper officer shall be full and sufficient discharge.



Bequests of a specific item or collection

There are occasions when donors wish to contribute specific items or a collection and these are particularly welcomed by the Society.

Example wording in respect of a specific item

*I give free of tax to the Great Western Society Limited (Registered Charity No. 272616) of Didcot Railway Centre, Didcot, Oxfordshire OX11 7NJ, the** and I declare that the receipt of their Treasurer or other proper officer shall be full and sufficient discharge.*

In such instances there may be a cost involved in transporting the item(s) in question to Didcot, especially where items of rolling stock are concerned and it is suggested that provision may be made for such eventuality with the following additional wording:

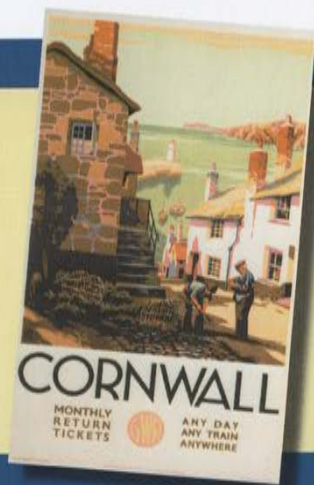
*"and I authorise my executors to pay the expenses of transporting the said** to Didcot Railway Centre from my estate"*

** Insert specific item(s)

If you are considering leaving an item of rolling stock to the Great Western Society, the GWS would particularly welcome some pre-notification in order that we may discuss such factors as the movement of the item to Didcot and any other wishes you may have.

Great Western Trust (Registered Charity No.289008)

The Great Western Trust (GWT) has been established to hold and manage the collection of small relics and artefacts. If you wish to bequest small artefacts or a legacy to further the aims of the Great Western Trust, please write to the Secretary, Great Western Trust, Didcot Railway Centre, Didcot, Oxfordshire OX11 7NJ for a copy of the Great Western Trust bequest form.



Amending your Will by codicil

If you have already made a Will, but would like to add a new bequest to the Great Western Society it is

possible to amend your current Will without making a new one. This can be achieved by making a Codicil.

Example wording for a Codicil

I of declare this to be a first/ second (††) codicil to my Will dated

In addition to any legacies given by my said Will, I give to the Great Western Society Limited (Registered Charity No. 272616) of Didcot Railway Centre, Didcot, Oxfordshire OX11 7NJ, the sum of £..... (or specific item(s) to be given) to be used for its general charitable purposes and I declare that the receipt of their Treasurer or other proper officer shall be full and sufficient discharge.

In all other respects I confirm my said Will and any other codicils thereto.

In witness whereof I have hereunto set my hand this day of 20.....

Signed by the said as a codicil to his/her last Will in the presence of us who at his/her request in his/her presence and in the presence of each other have hereunto subscribed our names as witnesses

†† Insert number as appropriate



Signature of Witness

Name

Address

Signature of Witness

Name

Address

Commemoration

The Society will be happy to consider providing a suitably worded plaque to mark a commemorative gift or bequest. Such plaques can be displayed in a suitable location.

Example wording for requesting a commemorative plaque

I give free of tax to the Great Western Society Limited (Registered Charity No. 272616) of Didcot Railway Centre, Didcot, Oxfordshire OX11 7NJ, the sum of £..... and I declare that the receipt of their Treasurer or other proper officer shall be full and sufficient discharge. It is my wish but without creating a binding trust that the GWS provide a plaque or some other suitable commemoration to mark this bequest and I authorise my executors to pay the cost of such commemoration from my estate.

Tax exemption

Bequests to the Great Western Society are fully exempt from Inheritance Tax in the United Kingdom.

Gifts and bequests to the Society are completely free from Capital Gains Tax and Stamp Duty in the United Kingdom.



Lifetime gifts

Some people like to make charitable gifts during their lifetime so that they can see the effect of their donations. The GWS is continually developing and improving the 'Great Western' Collection and always has a number of specific projects in progress at any one time. The Society welcomes gifts for specific projects and our Secretary will always be happy to discuss particular requirements with donors and their advisers.

There are a number of tax efficient ways of enhancing a donation, such as Gift Aid, details of which are available from the Great Western Society.



YOUR GIFT WILL HELP TO
ENSURE THAT PAST TRIUMPHS
SEE FUTURE GLORY



Great Western Society Limited Didcot Railway Centre
Didcot Oxon OX11 7NJ.

Registered Charity No. 272616