



Leave a living legacy

A GUIDE TO
LEAVING A GIFT IN
YOUR WILL TO THE SOC



**The Scottish Ornithologists' Club, Waterston House, Aberlady, East Lothian EH32 0PY
Tel: 01875 871 330, Email: mail@the-soc.org.uk**

The SOC is a Scottish Charitable Incorporated Organisation SC 009859. © The SOC 2018.

The SOC has benefitted greatly from past members who have remembered the Club in their Will.

Without the generosity and forethought of these individuals, we would not be able to continue our important work recording Scotland's birds.

Leaving a legacy to the SOC, no matter what size, can help us safeguard Scotland's birds for the future.

THERE ARE VARIOUS
WAYS YOU CAN REMEMBER
THE SOC IN YOUR WILL
AND WE HOPE THAT THIS
BOOKLET WILL GUIDE YOU
THROUGH THE PROCESS.

If we don't answer all of your questions here, then please get in touch with staff at Waterston House.

01875 871 330

membership@the-soc.org.uk

All enquiries are confidential and without obligation.

A participant on the SDCL'sle of May Young Birders' Training Course learning to ring birds

WHY LEAVE A GIFT TO THE SOC?



Image © Laurie Campbell

Many people consider birds to be the litmus paper test for the health of the environment. By recording which species we've seen, when and where and how many we saw, scientists can gain a greater understanding of the effects that pollution, habitat loss, climate change and modern farming methods are having on our wild birds. The database of information collected is an extremely important archive of local information – a critical tool for future bird conservation. The data that SOC volunteers collect and collate is made available to organisations such as RSPB and is one of the first points of reference in informed conservation planning.

It is also available to conservationists, planners and developers; wherever possible we work with partner organisations to promote the practice of bird recording and record sharing.

As we all know, change is happening on an unprecedented scale and beyond what we might have imagined. The SOC's work, recording and monitoring Scotland's birds and encouraging birdwatchers around the country to submit their sightings, is now more important than ever.

We need your help to safeguard our birds for the future.



Participants on the SOC's Birdwatching for Beginners Course

LEGACY GIFTS HAVE ENABLED US TO CARRY OUT AND SUPPORT SOME OF OUR MOST IMPORTANT PROJECTS AND RESEARCH TO DATE AND WE CANNOT THANK YOU ENOUGH FOR CONSIDERING THIS WAY TO SUPPORT US.



Image © Laurie Campbell

A gift to the SOC in your Will will help secure the future of the Club and allow us to continue our important work watching over Scotland's birds.

In 2014, SOC and Isle of May Bird Observatory joined forces to pioneer the first and only course of its kind: the *Young Birders' Training Course (YBTC)*.

A week-long funded opportunity, the course allows six young naturalists (aged 16 – 25 years) to spend a week at the Isle of May Bird Observatory learning firsthand, a wide range of bird survey skills and techniques. These skills are outwith the scope of most university/college curricula yet are essential attributes for those embarking on a career or role in wildlife recording/conservation.

So far, 18 young birders have taken part on this course and its success has sparked a wave of similar initiatives by related organisations. One of the aims of the Club's work in this area is to address the seemingly widening gap between today's young people and nature.

Such gifts allow the Club to plan for the future and better inform our decisions with regards to which projects we can support and the development work we can look to undertake.



The 2015 Young Birders' Training Course participants and leaders © Samuel Hood



Participants on the Young Birders' Training Course Constructing Tern Nestboxes

“Taking part in the YBTC has been life changing. I was introduced to a team of dedicated scientists who provided me with first-hand experience of the research and conservation work carried out on the Isle, which has since inspired me to participate in bird ringing locally.

We had the opportunity to give a presentation at the SOC’s Annual Conference, which boosted my confidence with speaking publicly and allowed me to reflect upon and share the enormity of information and experience that I had gained during the course. I have since taken up a different volunteering role by becoming a member of a Youth Panel Project. Being a member of this panel is a role that I wouldn’t have considered before my time on the training course”

Julia, 2015 YBTC participant

The project has been financially viable thanks to generous past members and supporters who have left legacies to the Club. SOC felt that investing in a future generation of conservationists, bird recorders and surveyors was an excellent use of legacy income.

Here’s some other examples of work we’ve been able to carry out, and projects we’ve been able to contribute to thanks to the financial support of individuals who’ve remembered the SOC in their Will:

- * CASE Studentship; legacy income has enabled us to jointly fund an Aberdeen PhD student investigating the winter distribution of Shag
- * Expanding the George Waterston Library
- * Supporting ornithological research through the SOC Endowment Fund
- * Production of a digital form of the SOC’s award-winning avifauna, *The Birds of Scotland*.

Leave a living legacy

The SOC would always advise that you seek advice from a solicitor before making or changing your Will to ensure that your wishes are carried out accurately.

All you need to do is to include our **full name** of *The Scottish Ornithologists' Club*, alongside our **registered office address** and **registered charity number**, and then state what form you would like your bequest to the charity to take (see 'Types of legacy' below).

REGISTERED OFFICE ADDRESS:

The Scottish Ornithologists' Club, Waterston House, Aberlady, East Lothian, EH32 0PY

REGISTERED CHARITY NUMBER:

SC009859

However, if you want to make completely sure of the correct wording used to make a bequest, please use the example wording provided below. Your solicitor will also be able to assist you with this.

TYPES OF LEGACY

There are a few different kinds of gifts you can leave in your Will. All sizes and types of bequest are greatly appreciated.

1. RESIDUARY BEQUEST – LEGACY OF ALL OR PART OF THE REMAINDER OF YOUR ESTATE

The gift of a set percentage of your estate after all other bequests have been made and debts paid is called a residuary bequest.

Example wording for giving a residuary legacy:

"I give all (or a specified percentage of) the residue of my estate absolutely to the Scottish Ornithologists' Club (Registered Charity Number SC009859) of Waterston House, Aberlady, East Lothian, EH32 0PY, for the general purpose of the Club and I direct that the receipt of the Treasurer for the time being or other duly authorised officer of the Scottish Ornithologists' Club shall be a sufficient discharge to my executors".

2. PECUNIARY BEQUEST – FIXED SUM LEGACY

The gift of a fixed sum of money in your Will is called a pecuniary bequest.

Example wording for a pecuniary legacy:

"I give to the Scottish Ornithologists' Club (Registered charity number SC009859) of Waterston House, Aberlady, East Lothian, EH32 0PY, the sum of £ (in words and numbers) for the general purpose of the Club and I direct that the receipt of the Treasurer for the time being or other duly authorised officer of the Scottish Ornithologists' Club shall be a sufficient discharge to my executors".

3. SPECIFIC BEQUEST

The gift of a particular named item left in your Will such as art work, book collection or shares, is called a specific bequest. If you are considering leaving a specific bequest, please do be aware that if we cannot use the gift directly for the work of the charity, we may wish to sell the item and put the proceeds into the Club.

Example wording for a specific bequest:

"I give to the Scottish Ornithologists' Club (Registered charity number SC009859) of Waterston House, Aberlady, East Lothian, EH32 0PY, the specific item(s) of _____ for the general purpose of the Club and I direct that the receipt of the Treasurer for the time being or other duly authorised officer of the Scottish Ornithologists' Club shall be a sufficient discharge to my executors".

FREQUENTLY ASKED QUESTIONS

Can I make my own Will?

Yes you can write your own Will. However, unless you are legally trained, you run the risk of drafting a Will in a way that may be unclear. A tiny error could invalidate the whole document. For these reasons the SOC would always recommend that you seek assistance from a solicitor to ensure that the wording is clear and precise and that your true intentions are carried out.

How do I leave a gift to the SOC if I already have a Will?

In this case, speak to your solicitor who can draw up a Codicil ('a change or addition to the Will') if it is a simple change. This means there is no need to make a new Will and avoids the costs of having to have your Will re-written. When completed and witnessed, a Codicil becomes a legal part of your Will and should be kept with the Will it refers to.

Are there any tax advantages of leaving money to a charity?

If you leave an estate of a certain value or above (this value can change with each Government Budget), it may be subject to inheritance tax. The inheritance tax threshold currently stands at £325,000 (2017). Any value of your estate over this figure will be liable for 40% tax. However gifts to charities are awarded before the valuation is calculated. From April 2012, people who leave 10% or more of their net estate to charity can choose to pay a reduced rate of Inheritance Tax of 36%. For more information on inheritance tax, go to the HM Revenue & Customs website www.hmrc.gov.uk.