

Gifts and Legacies

As an independent charitable trust we receive no statutory funding so we are always extremely grateful for any gifts or legacies from those who wish to remember the museum in their wills. These gifts help us to provide a future for our history. Without such help we would be unable to maintain the collections we hold and the building itself for future generations to enjoy as you do now.

What kind of legacy can I leave?

A legacy that is free from restrictions is the most beneficial for the museum as we can use that where it is needed the most urgently. If however, there is a fund that you are specifically interested in you can contact us for further details of those so please do get in touch. There are two main types of Legacy; Residual where you can leave us a share of your estate or the residual balance of your estate once all gifts, tax and expenses have been paid. The other type is a Pecuniary legacy where you leave us a fixed sum. Legacies to a registered charity are free from inheritance tax and in some circumstances a charitable bequest can be a useful way to avoid paying inheritance tax on all or part of your estate.

How do I add a Legacy to my Will?

If you have a Will already you will not need to write a new one, you can make an amendment by adding a Codicil. Or, if you are having a new Will drawn up you can add a simple paragraph such as the example below. This is only suggested wording and you are advised to take your own legal advice when amending or drafting your Will.

In addition to any legacies given in my said Will, I give to the Wells Museum (hereinafter called Wells & Mendip Museum) a Charity registered in England & Wales no.200738, of 8 Cathedral Green, Wells, Somerset, BA5 2UE or to whatever registered charity or Charity Commission approved organisation that may succeed it

- The sum of £ **or**
- A % share of my estate **and/or**
- The following specific item(s)

To be used for its general purposes and I declare that the receipt of the Treasurer or duly authorised officer shall be a full and sufficient discharge.

Contact us today

Call: 01749 673477

Email: admin@wellsmuseum.org.uk

Write to us at: Wells & Mendip Museum, 8 Cathedral Green, Wells, Somerset

BA5 2UE