

Gifts & Legacies



Sampler from the Evelyn Perkins collection

Wells & Mendip Museum
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Proposed wording for your Legacy

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

"I give to the Wells Museum (hereinafter called Wells & Mendip Museum), a charity registered in England and 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 residue (or %..... share of the residue) of my estate absolutely and I direct that the proceeds may be used for the general purposes of Wells & Mendip Museum, or that it is divided between the Fund %..... and the remainder %..... for the general purposes of the museum. A receipt signed by a person being authorised by the Board of Wells & Mendip Museum shall be a good and sufficient discharge to my executors."

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

"I give to the Wells Museum (hereinafter called Wells & Mendip Museum), a charity registered in England and 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 £..... and I direct that the proceeds may be used for the general purposes of Wells & Mendip Museum, or that it is divided between the Fund %..... and the remainder %..... for the general purposes of the museum. A receipt signed by a person being authorised by the Board of Wells & Mendip Museum shall be a good and sufficient discharge to my executors."

Inheritance Tax

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

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

The Museum and its Collections

The museum was founded in 1893 by Herbert E. Balch, a renowned amateur archaeologist, naturalist and caver.

It was formed with the vision of “maintaining a museum for the benefit of the public of the city of Wells and the Mendip area, and advancing the education of the public in the conservation, protection and improvement of the historical and natural environment of the Wells and Mendip area.”

This vision remains at the core of the museum's activities, and we are still guided by our founder's principle to "Search and Learn."

The museum has been at its current address since 1928, the Grade II listed former cathedral chancellors' house. The museum holds collections of significant cultural value, and of local and national significance. These include:

- Amazing archaeological and palaeontological material from Mendip caves
- A wonderful collection of embroidery samplers gifted by a local collector, Evelyn Perkins
- Rocks, minerals from the Mendip Hills, and evidence of the area's rich mining heritage
- Material that charts cave exploration on Mendip, including cave diving pioneered in the nearby Wookey Hole cavern
- The Phillips Photographic Studio collection of glass plate negatives, a unique social history resource

- A Statuary that tells the story of the early Cathedral stonemasons through a collection of sculpture and statues.

We also have a library and are home to the Wells City Archives.

Access to the collections for local studies and academic research is encouraged.

The museum plays an important role in the local area's community and cultural life, being operated by over sixty volunteers. It also provides a venue for local societies and groups to meet, for local artists and craftspeople to display their work.

The museum is intimately linked with the Wells Natural History & Archaeological Society (WNHAS). Herbert Balch was one of the society's original members, and it has been instrumental in the foundation and operation of the museum.

We also have an active Friends group that supports the museum through a range of events and activities.

The museum operates an Accredited Museum under the Arts Council England Scheme.

Gifts and Legacies

The museum is an independent charitable trust that receives no statutory funding, and as such welcomes gifts and legacies from people wishing to remember the museum in their wills. Without such generosity the museum finds it difficult to fulfil its aims and objectives.

Please consider leaving a gift to the museum, no matter how large or small, as it will help us

to maintain the collections and the building for future generations, fund the permanent displays and temporary exhibitions.

The most beneficial gift is that of an unrestricted, or general gift which allows us to use it wherever the need is greatest, but the museum also administers several funds that are dedicated to specific causes, to which a gift can be specified at the donor's wish. They include:

- The Imray Fund, directed to funding the interpretation of the City of Wells
- The Library Fund, dedicated to spending on the library and its specialist collections.
- The Wyndham Fund, which is dedicated to funding schools learning
- Conservation of samplers, for which the attention of skilled textile conservators is needed
- Garden upkeep and development.

Further details of these funds are available by request from the museum. A donor could also divide their gift or legacy between a specified fund and for discretionary use by the museum.

Should you wish the museum to benefit from a gift or legacy, we strongly recommend that you speak with a solicitor or professional advisor. We suggest, overleaf, a suitable form or wording to include the museum in your will.