



Sussex Ornithological Society

Legacies Information Pack

Thank you so much for considering leaving a gift to SOS in your Will. Your gift, however big or small, will help us continue to give grants towards conservation of our birds, and to inspire new generations of bird lovers.. What better thing can you do than to leave a gift that you know will be spent on helping birds in Sussex?

We have included some information below about how you can give a gift to SOS in your Will and we hope you will find this useful, but if you still have questions please contact our Treasurer at treasurer@sos.org.uk.

How Your Gift Will Be Used

With so much of Sussex under ever increasing development pressure, it becomes even more important that the reserves where birds are protected are kept in the very best condition, and this is where we are able to help. Since we were founded in 1962, the SOS has made grants totalling over £500,000 including;

Work to improve and conserve habitats for birds, such as the creation of new scrapes, restoring wetland habitats for breeding birds and repairing ponds.

We have also funded new bird hides, providing places where people can observe birds and be inspired to support their study and conservation.

However, our grants don't go just to larger organisations running the county's nature reserves. We also fund local community projects, for example to provide maintenance of hedgerows or the provision of bird boxes, and we have funded a school bird project. We also contribute to the cost of bird surveys.

It can be helpful if national organisations can show evidence of support for such purchases from the local bird club, such as the SOS, as that can make it easier for them to attract funds from other sources.

If you are considering making a legacy to SOS, some of your questions may be answered by the information below:

How to Leave a Gift

Making a Will

It is always best to have your Will prepared by a solicitor who specialises in estate planning. A Will is a legal document and trying to write your own may be a false economy. If not done properly, it may be costly to rectify after your death.

What information do I need?

You will need to specify our charity's registered name, contact details and charity number. These are:

- Registered name: Sussex Ornithological Society
- Contact details: treasurer@sos.org.uk
- Registered charity number: 256936

Types of gift

There are a number of ways you can make a gift to the SOS.

A residuary gift: leaving all or part of the residue of your estate after all expenses and debts have been settled.

For a residuary gift to the SOS, we suggest the following wording:

"I give to Sussex Ornithological Society (registered charity number 256936), treasurer@sos.org.uk a [e.g. one quarter, one half, 20%] share of the residue of my estate for its general charitable purposes and I declare that the receipt of the Honorary Treasurer or other proper officer of the Sussex Ornithological Society for the time being shall be a full and sufficient discharge to my executors and trustees."

A pecuniary gift: leaving a specific sum of money.

For a pecuniary gift to the SOS, we suggest the following wording:

"I give the sum of £[amount] to the Sussex Ornithological Society (registered charity number 256936), treasurer@sos.org.uk for its general charitable purposes and I declare that the receipt of the Honorary Treasurer or other proper officer of the Sussex Ornithological Society for the time being shall be a full and sufficient discharge to my executors and trustees."

It is most useful to SOS if gifts are made available for our general charitable purposes, giving us the ability to apply the gift where it is needed most at the time, however you can specify if you wish:

What if I would like my gift to specifically go towards funding publication of future Sussex Bird Reports or the next Avifauna or Bird Atlas?

You can do this. You can use the same wording detailed above but replace the words *“for its general charitable purposes”* with *“and I express the wish that it be applied towards the publication costs of future annual Sussex Bird Reports but if the publication is no longer in print then for its general charitable purposes.”* or *“and I express the wish that it be applied towards the publication costs of the next SOS Avifauna or Bird Atlas but if either or both of these publications are no longer in print then for its general charitable purposes.”*

Your Questions Answered

I’ve already made my Will, how can I change it to include a gift to the SOS?

Consult a solicitor who specialises in estate planning for advice. It may be possible to include a gift to the SOS in a document called a codicil instead of having to re-write your Will. A codicil is a document in which amendments or additions are made to an existing Will and must be read in conjunction with it (so it should be kept with the existing Will).

Are there any tax advantages of leaving a gift in my Will to a charity such as the SOS?

Including SOS in your Will is a tax-efficient way of supporting us. Under current legislation your estate will not have to pay inheritance tax on any gifts given to charities. You can also cut the inheritance tax rate on the rest of your estate from 40% to 36%, if you leave at least 10% of your ‘net estate’ to a charity. In certain circumstances, especially with larger estates, a charitable bequest can be a useful way to reduce the payment of inheritance tax on some or all of your estate. We recommend that you consult a solicitor who specialises in estate planning in order to ensure that the gift in your Will is worded correctly to enable the reduced rate of tax to apply.

What should I leave you?

We ask that you only leave us money or optical equipment (see next question), as we do not have the resources to handle any other gifts

Can I leave binoculars or telescopes in my Will to the SOS?

If you have reasonably new binoculars or telescopes in good condition we would be delighted to accept them and they would be offered through our Young Birders Scheme. This will support access to expensive optics for those who could not otherwise afford them.

If you would like to leave us some optics, please contact the SOS Secretary at secretary@sos.org.uk.

Can I donate a memorial seat?

We don't have anywhere to place a memorial seat, however if you are thinking of donating in memory of someone there are other things you could do such as donating to SOS through the **Donate** button on the website.

I would like donations at my funeral in lieu of flowers to be used for the benefit of Sussex's birds. How do I ensure that this happens?

You may prefer to see donations made to the SOS in lieu of floral tributes. There are a number of online platforms for creating In Memory pages and collecting donations.

Can I name the Sussex Ornithological Society as an executor?

Unfortunately, we do not have the required trust corporation status to act as executors.

Should I let the SOS know if I include you in my Will?

Your Will is private and there is no need to let us know, but if you do it will enable us to acknowledge your wonderful gesture.

If you decide to let us know, we'd love to hear from you at treasurer@sos.org.uk.