LEAVE A

LEGACY

Archway is a Scottish charity providing support for children and adults with learning disabilities and their families throughout Aberdeen and Aberdeenshire.

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As a parent-led charity, we pride ourselves on listening to what our families say and put them at the heart of everything we do.

The Archway Vision

Over 30 years ago a group of parents and carers got together with a vision to create a unique new charity that would support families just like theirs.

Over the years, Archway's purpose has not wavered.

Today, we continue to nurture the network of care which supports the individual and the family, values their uniqueness, upholds their rights, and respects their dignity.

Our current services and support includes:

- Permanent care
- Care at home and housing support
- Residential respite breaks
- Emergency respite breaks
- A range of online activities
- Holiday home
- 7 till 9 Club
- Care at home support

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Since she was born my husband and I have worried about what will happen when we are no longer here to take care of our daughter. Now we have Archway we know she will be okay.

Archway Parent

A gift in your Will means providing support for people with learning disabilities - now and in the future

Families come to Archway because they need reliable, safe, high quality support for their children and loved ones.

To make sure we can provide that year after year, we rely on gifts and donations to create new services, build fit-for-purpose facilities, purchase and upgrade equipment and wheelchair accessible vehicles, provide outings and activities . . . and much more.

A gift in your Will allows us to make sure individuals continue to receive the support they need no matter what.

Lesley is so happy. The house and staff are amazing. It is better than we dared hope for and I just wish everyone could have this.

Archway Parent

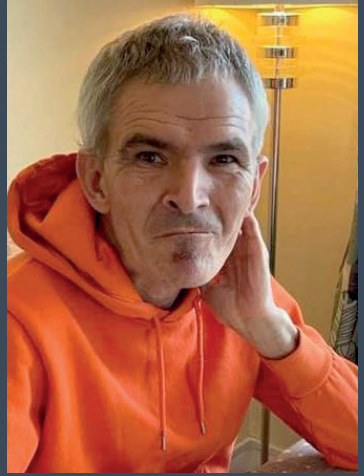
> We love our daughter more than anything but caring for her is such a huge responsibility and we are so grateful to Archway for sharing that responsibility with us.
>
> *Archway Parent*

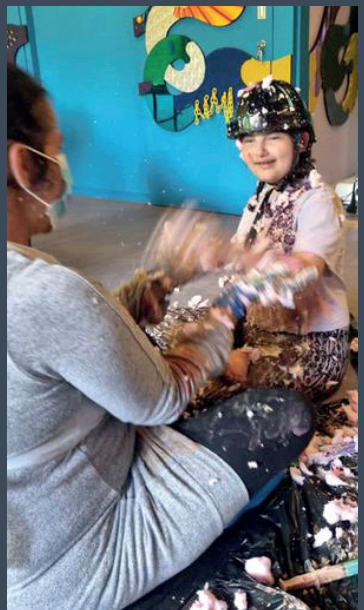
Your gift makes a difference

As a small parent-led charity your support is vital to us and makes a world of difference.

Here are just some examples of how a gift left in a Will has changed the lives of people in our care:

- Collector's items and antiques were donated and auctioned raising over £45,000 for a number of projects.
- St Margaret's Place, our first supported living service, was purchased thanks to a legacy gift and other donations.
- A mini-bus was purchased thanks to gifts and donations.
- Betty's Place, our holiday home at Nairn, was purchased thanks to a gift in a Will.





Pledge to help Archway support families for generations to come

Why do I need a Will?

A Will ensures your wishes are carried out after you are gone. Having a Will makes sure the causes and people you care about are taken care of. It's where you decide what happens to your money, property and possessions after you are gone.

Why do people leave a gift in their Will to Archway?

People leave a gift to Archway for many reasons. For some, Archway has provided care and support for someone they love. Some recognise how valuable Archway's work is to people in their local community. Others want to support a charity who make it their mission to provide care and support for those who need it most.

Whatever your reason, your gift will make sure Archway can continue to be a safe-haven for children and adults with learning disabilities.

Where will my gift go?

Funds are distributed based on the needs of those in Archway's care. Your gift may become part of a larger project like developing a new supported living service, purchasing special equipment like wheelchair adapted mini-buses, or funding fun things like outings and activities.

What happens if I don't have a Will?

If you do not have a Will your estate is said to be 'intestate' and your wishes may not be carried out. Having a professionally written, up-to-date Will is the best way to make sure your requests are met.

Can Archway create my Will for me?

Archway is unable to draw up your Will for you. Seek professional advice.

Who can write or update my Will?

A solicitor or a Will-writer can create a professional will for you. This will ensure it is valid and properly witnessed.

You can find someone to write your Will by contacting the Law Society of England and Wales, or the Law Society of Scotland, depending on where you live.

I already have a Will. Should I update it?

If your circumstances change, then it's a good idea to update your Will. Changes that affect your Will includes divorce, marriage, separation, death, a new arrival or any change in your financial circumstances.

What is an executor and how do I choose this person?

An executor is the person you choose to make sure your Will is executed as you intend it to be. It's best to choose two people in case one isn't able to act on your behalf. You can choose friends, family or your solicitor. It's important to know that naming someone an executor doesn't stop them benefiting from your Will.

Where should I store my Will?

Your Solicitor or Will-writer will keep a copy for you as part of their service. Make sure you keep a copy along with any other useful information like pensions, bank accounts and other information the executors will need to carry out your wishes.

Different types of Wills

Residuary gift

A residuary gift is a share of your estate. This type of gift is the most beneficial because it's a percentage of your estate, rather than a fixed amount. This means it will retain its value and won't be affected by inflation.

If you'd like to leave a residuary gift, here's some suggested wording to put in your Will:

'I give [...] % of the residue of my real and personal estate to Archway Charitable Trust of [... address] and the receipt of the Honorary Treasurer or the proper officer for the time being of Archway shall be a complete discharge to my executors.'

Pecuniary gift

This is a specific amount of money given in a Will. Otherwise known as a 'cash gift'.

If you'd like to leave a pecuniary gift, here's some suggested wording to put in your Will:

'I give the sum of [... in words] pounds [£ ... in figures] to Archway Charitable Trust of [... address] and the receipt of the Honorary Treasurer or the proper officer for the time being of Archway shall be a complete discharge to my executors.'

Specific gift

A specific gift is something specific like jewellery, stocks and shares, or a property.

If you'd like to leave a specific gift, here's some suggested wording to put in your Will:

'I give to Archway Charitable Trust of [... address] absolutely, my [... name and description of item].'

A gift in trust

You can leave a gift for someone to use over a period of time. When the time has ended, the gift can be passed on to another recipient, such as a charity. This is known as a 'life interest'.

A conditional gift

This is a gift that's made only if another event happens first. For example, your Will could state that a gift only applies if all other beneficiaries named in your Will die before you do.

We recommend asking a solicitor about gifts in trust, life interests, and conditional gifts, to make sure the wording is correct.

Archway Service User

I love going to Archway. It's my favourite place in the world and Mum and Dad are happy because Archway look after me like they do.

Inheritance Tax

What is inheritance tax?

Inheritance tax is the amount of money that will need to be paid from your estate if it's over a certain value. This amount may change in the future and there are exemptions and benefits available to married couples and civil partners. Please talk to a solicitor for more information. You can also visit the HMRC website to find out more at hmrc.gov.uk

Minimising inheritance tax liability

If you leave a gift in your Will, you may be able to reduce, or even eliminate your inheritance tax liability. Gifts to charities are 100% tax-free and are taken out of your estate before tax is calculated.

Since April 2017, if you leave 10% of your net estate, after certain deductions, your inheritance tax rate will be reduced from 40% to 36%.

Please be aware that these rates are subject to change. If this sounds like something you might want to consider, we recommend talking to a solicitor or HMRC for further advice and information.

Information you will need to write or update your Will

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- Your Name
- Your Address
- Partner's name and address
- Children's name and addresses
- Legal guardian's full names and addresses
- Executor's full name and addresses
- Funeral instructions
- Pet care instructions
- Other

Assets and value

- Home and other property (£)
- Car (£)
- Furniture (£)
- Items of particular value (jewellery or artwork) (£)

Financials

- Savings in banks for building societies (£)
- Stocks, shares, premium bonds, etc (£)
- Insurance policies (£)
- Pensions (£)
- Other (£)
- Less: mortgage, loans, credit cards etc (£)

"The staff know our daughter so well that just for a few days we can relax knowing she is in safe hands.

Archway Parent

It's not just about leaving a legacy. Regular giving is vital

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As well as a legacy, large or small, every gift makes a difference. Some people choose to donate monthly.

Here are just some ways regular giving can also help:

£20 a month — can fund an **outing or activity**

£30 a month — can fund **toys, games and craft equipment**

£50 a month — can fund **regular fun activities for up to 6 people**

"Thank you so much for allowing us to holiday at Betty's Place. It was the most beautiful weekend.

We had a lovely time.

Archway Family

Glossary

Assets

Your assets are the things you own that are worth money, such as a house, car, savings or shares.

Beneficiary

A person or institution, such as a charity, who receives a gift from a Will.

Codicil

A document which amends your Will, but which is signed and witnessed in the same way as your Will.

Conditional legacy

A gift in a Will which will only take effect if a condition is met upon the legator's death.

Estate

Your estate is the total value of everything you own, after any outstanding debts have been paid.

Legacy / Bequest

This is a gift of money, property or other asset in a Will.

Liabilities

Your liabilities are the things you owe money on, such as a mortgage debts and credit cards.

Legal Guardian(s)

If your children are under 18, you can appoint Legal Guardians in your Will to care for your children.

Legator / Testator

The person who has made the Will.

Trustee

The people or institutions specified in your Will who will manage a Trust set up in your Will.

I'm thinking of leave a gift for Archway or giving regularly.

What should I do next?

For more information, or if you'd like to talk to us, you can contact us by

Phone 01224 64 33 27

Email giving@archway.org.uk

Archway Charitable Trust
71 Westburn Road, Aberdeen AB25 2SH

You can also visit out website to find out more about what we do:

www.archway.org.uk

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Archway Charitable Trust is a charity registered in Scotland. Charity No: SC048760