



Some of the options for leaving a legacy through the Foundation include:

## ■ Establishing a personal legacy fund

Larger bequests can be used to establish a personal fund. A personal endowment fund can be set up that is invested and the income used to support your passions. The gift has a real impact on the community and provides a long-lasting benefit for generations to come. Your family can work with us to decide on the support your legacy provides and can visit projects to see the impact of your gift first-hand. Please note, a minimum donation does apply for establishing a personal fund.

## ■ Contributing to an existing fund

Gifts of any size can be added to one of the funds already set up with the Foundation. This includes a number of Collective Funds, for example, funds that benefit the local area that you live in, or an issue that you are passionate about - in this instance, you can support Horsley. The gift is invested alongside other donations, multiplying the overall benefit.

## ■ Supporting Surrey's changing needs

Simply by naming the Horsleys Community Fund as the beneficiary in a Will means that we have the flexibility to support a wide variety of important local causes and respond to changing needs over time. We guarantee to use the donation in the best and most effective way to improve lives across the county.

## Beneficiaries of Wills

If you are the beneficiary of a Will, tax relief can also be granted by using a Deed of Variation. A Deed of Variation can be executed within two years of a death to change a Will. This would allow you to make or increase a gift to the Horsleys Community Fund, possibly resulting in significant tax savings. The Foundation does not need to have been named in the original Will for you to do this.

*Please note that this is in no way intended to offer advice on your estate planning and not all reliefs or benefits to which we refer may apply to you. Tax can be a complicated area and we strongly suggest you seek independent professional advice before taking any action. All figures and tax rates are correct at the time of writing but please be aware that these may be subject to change - January 2019.*

**For further information please contact the**

**Community Foundation for Surrey**

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**[www.cfsurrey.org.uk](http://www.cfsurrey.org.uk)**