

**ILKLEY
MANOR
HOUSE**

A GUIDE TO LEAVING A GIFT IN YOUR WILL

*By leaving a gift in your will you can help
safeguard the Manor House for future generations to enjoy*

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In 1959 Percy Dalton gifted the Manor House to Ilkley as an art gallery and museum, and it served that important civic function for over 50 years, attracting 17,000 people per annum before its temporary closure in 2015.

In 2017, Ilkley Manor House Trust (IMHT) was formed to take on the stewardship of the building for future generations.

Our purpose, set out in our Articles of Association, is to promote and preserve for the public benefit the Grade 1 listed building together with its collections, gardens and grounds and cottages for the benefit of all, by working together to advance education in heritage, culture, and all aspects of the arts and sciences.

Ilkley Manor House Trust is a charity that relies on funding from a wide range of sources and so legacies are crucial to enable us to keep the building and its collection freely accessible to all.

Each and every gift, large or small, will help us care for Ilkley Manor House and its collection, support special exhibitions, and deliver innovative heritage learning and engagement programs in future.

Making or updating your will is straightforward but it is a big decision and we recommend that you seek professional advice. This guide is a simple introduction to the kinds of things you will need to think about.

If you have any questions after reading this guide, or would just like to talk through your ideas, please contact us.

The building has been cared for by generations before us, and now it is our turn to look after it for future generations to enjoy.

Leaving a gift in your will to Ilkley Manor House Trust after you have remembered your loved ones makes this possible.



Sir Rodney Brooke
President, Ilkley Manor House Trust



Sarah Thomas
Chair, Ilkley Manor House Trust

What you need to know about leaving a gift in your will

Can I choose how my gift is spent? Yes. Whilst we welcome gifts that can be spent wherever the need is greatest, we are also very happy to accept gifts with an expression of a wish for a particular purpose. That means you can inform of the Trustees of your wish as to what your money is spent on. You might choose to improve accessibility to the Manor House or enable us to improve the way we interpret our collections for children.

What's the difference between a pecuniary and a residuary gift? You can choose to leave either a fixed amount of money (a pecuniary gift), or a share of what's left over after all your wishes have been carried out (a residuary gift). Many people choose the second option because the value of the gift remains proportionate should the estate fluctuate.

Can I minimise Inheritance Tax with a gift to the IMHT? Any gift to us is free from Inheritance Tax. There are tax planning measures that can reduce Inheritance Tax on the estate through charitable giving, but these can be nuanced and subject to change – please ask your adviser for help.

Do I need to tell you that I've left a gift in my will to the IMHT? No, you don't have to tell us, but if you would like to tell us, we'd love the chance to thank you.

If I want to include IMHT in my will, do you have set wording I can use? Yes, you'll find some suggested wording below. We recommend that you use a qualified solicitor to ensure your wishes are recorded properly.

Suggested wording for the ways you can leave a gift in your will

A straightforward gift for general purposes

For a set sum (pecuniary legacy), we suggest: *I give free of tax to the Trustees of Ilkley Manor House Trust, Ilkley Manor House, Castle Yard, Church Street, Ilkley, West Yorkshire, LS29 9DT, Registered Charity No. 1174051, the sum of [amount in words] (amount in figures) to be used for their general charitable purposes, and I declare that the receipt of their Director or other proper officer shall be a full and sufficient discharge to my executors.*

For a share of an estate (residuary legacy), we suggest: *I give free of tax [insert proportion e.g. one third] of the residue of my estate to the Trustees of Ilkley Manor House Trust, Ilkley Manor House, Castle Yard, Church Street, Ilkley, West Yorkshire, LS29 9DT, Registered Charity No.1174051, to be used for their general charitable purposes and I declare that the receipt of their Director or other proper officer shall be a full and sufficient discharge to my executors.*

A gift towards a specific aspect of our work

I give free of tax [specify sum or proportion of residue] to the Trustees of Ilkley Manor House Trust, Ilkley Manor House, Castle Yard, Church Street, Ilkley, West Yorkshire, LS29 9DT, Registered Charity No.1174051, and I express my wish (without imposing any legally binding obligation) that such gift should be used by the Trust at its discretion for [specify an area of our work such as collections care, heritage learning and engagement or improving accessibility].

For further information or to talk through your ideas, please contact us by phone on 01943 607 030 or by email at legacies@ilkleymanorhouse.org

Ilkley Manor House Trust

We are a charity set up in 2016 by a passionate and committed group of local residents who saw the importance of working in partnership to keep the Manor House open as a community asset for all to enjoy.

www.ilkleymanorhouse.org

If you would like this information in an alternative format, please call us on 07834 547 959 or you can email us at admin@ilkleymanorhouse.org

Ilkley Manor House Trust is a company limited by guarantee, and an independent registered charity, number 1174051. Its board is made up of volunteers.

Patron: Alan Titchmarsh MBE DL HonFSE

President: Sir Rodney Brooke CBE DL

Chair: Sarah Thomas

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