

TAX EFFECTIVE GIVING

**The
Eric Thompson
Charitable Trust**

**for organists
and organ music**

Registered Charity No 1026344

Gift Aid

The most tax-effective method of charitable giving in the UK is through Gift Aid. If you are a basic rate taxpayer, for every £1 you donate The Eric Thompson Trust can claim 25p from HM Revenue and Customs.

Higher rate taxpayers can claim additional tax relief on the gross value of their gift.

To qualify for Gift Aid, you must pay UK income tax or capital gains tax equal to the amount the Trust claims in relation to your gift, in the relevant tax year.

All you need do is complete the Gift Aid Declaration on the enclosed Cash Pledge Form.

Payroll Giving

Under the Give as You Earn scheme you can authorise your employer to deduct your charitable donation from your payroll before calculating PAYE tax. Your employer will then forward your donation to The Eric Thompson Trust.

Matching Gifts

Many companies run matching gift programmes which could double your charitable contributions. Check with your Human Resources office to see if your company offers this facility.

Shares and Property

If you choose to give shares or property to The Eric Thompson Trust, you can claim personal income tax relief equal to their market value.

Additionally you will not have to pay capital gains tax on any increase in the value of the assets since you bought them.

Similar relief also applies to gifts of land and buildings.

Corporate Giving

Limited companies can claim corporation tax relief by giving to The Eric Thompson Trust.

Legacy Bequests

By making provision in your will you can endow The Eric Thompson Trust's work for future generations.

Bequests can include property as well as cash or shares and are normally exempt from UK inheritance tax.

Legacies can easily be made by writing a codicil to an existing will, as advised by a solicitor. More details and sample wording are enclosed.

The Eric Thompson Trust
17 Hill Street
St Albans AL3 4QS

020 3143 3040
info@organtrust.org
www.organtrust.org

CASH PLEDGE FORM

**The
Eric Thompson
Charitable Trust**

**for organists
and organ music**

Registered Charity No 1026344

Name:

Address:

Telephone:

Email:

I would like to contribute a total of £ _____ to The Eric Thompson Trust,
as a one-off payment / over a period of _____ years *

** Delete as applicable*

Method of payment:

tick as applicable

- I enclose a cheque made payable to **The Eric Thompson Trust** for £ _____
- I wish to donate £ _____ Monthly * Quarterly * Annually * as shown on the Standing Order Mandate below.

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By using Gift Aid you increase the value of your gift to the Trust (currently 25p for each £1 you give) at no extra cost to you.

- YES I would like The Eric Thompson Trust to reclaim tax from HM Revenue & Customs on all donations I make to the Trust. *

I am a UK taxpayer, and I understand that I must pay an amount of Income Tax and / or Capital Gains Tax at least equal to the tax that the Trust reclaims on my gift/s in the appropriate tax year. I am under no obligation to make any further donations and I can cancel this declaration at any time. If my circumstances change, I will notify the Trust.

Signature/s:

Date ____ / ____ / ____

Signature/s _____

Date ____ / ____ / ____

- I wish to remain anonymous – as such I understand my gift is confidential to the Trustees
- I would like to receive emails providing me with updates on events and the Trust's activities



Standing Order Mandate

To the Manager of (your bank) _____

Bank address _____

Please pay to: CAF Bank Ltd
25 Kings Hill Avenue, West Malling, ME19 4JQ

Account Name: The Eric Thompson Trust

Sort Code: 40-52-40

Account No.: 00002472

The sum of: £ _____

On (date): _____

And thereafter **monthly / quarterly / annually** * on the same date of the month for _____ years / until further notice *

** Delete as applicable*

Account Name: _____

Sort Code: _____

Account No.: _____

Signature/s: _____

Date: ____ / ____ / ____

LEAVING A LEGACY

Why make a will?

If you die without leaving a will, the law dictates the distribution of your estate. Writing a will is the only way to ensure that what you leave behind is distributed according to your wishes.

If you die without leaving a will and without any surviving relatives, the government may take a substantial part of what you leave behind. If you make a will, you may reduce the burden of inheritance tax for your family.

Common misconceptions that wills are complicated, expensive or unnecessary prevent many people from making one.

After you have looked after your family and friends, you may wish to leave a gift to a charitable cause.

How to remember The Eric Thompson Trust in your will

The Eric Thompson Trust is a registered charity and, under current rules, any gift you make to the Trust in your will is exempt from inheritance tax and capital gains tax. Your legacy can, therefore, make a difference to the amount of inheritance tax for which your estate is liable. Making or amending a will can seem a daunting prospect, but it is easier than you may think, and helps to provide certainty to those who are left behind.

The 3 main types of legacies are:

- A Residuary legacy, which is the remainder, or a percentage share of the remainder, of your estate once specific bequests have been made (e.g. to family, friends and other charities)
- A Pecuniary legacy, which is a precise sum of money
- A Specific legacy, such as a car, property, or other item(s)

The Eric Thompson Trust is happy to discuss any specific wish you may have for the use of your gift, along with assistance on suitable wording for your legacy in your will; however, it is important to seek the advice of a solicitor or financial adviser when planning your will. Some legators entrust the Charity to invest their bequest in the area of our work that most needs support at the time the bequest is received, while others opt to make a specific request for the use of their legacy.

Confirmation from you that The Eric Thompson Trust is eventually going to benefit from your legacy is extremely helpful to us, as it enables us to plan for the future, keep you updated and informed about our work and discuss with you how you would like your gift to be used and acknowledged. Your wishes will always be respected.

Although we would like to thank and recognise all legators during their lifetimes, please let us know if you would prefer your legacy to remain anonymous.

LEGACY PLEDGE FORM

The
Eric Thompson
Charitable Trust

for organists
and organ music

Registered Charity No 1026344

Name:

Address:

Telephone:

Email:

Thank you very much for considering leaving a legacy to The Eric Thompson Trust.

This form is not legally binding but it is very helpful as an indication of your intentions.

I have left a legacy to The Eric Thompson Trust in my Will.

or:

I wish to write a Codicil or amend my Will to include The Eric Thompson Trust.

Please contact me to discuss this in more detail e.g. wording of the Will, specific area of work etc.

In today's terms the value of the legacy will be approximately £ _____

Signature _____ Date ____ / ____ / ____

The Eric Thompson Trust would like to include your name in appropriate publications. However, please tick this box if you would prefer your plans to remain confidential.

We would like to keep you updated with news and events that may be of interest to you. Please tick this box if you wish to receive mailings or emails from us.

The information you have provided will be stored in accordance with the Data Protection Act and will not be passed on to third parties.

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