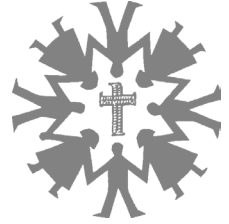


Othona



*Where there's a will...*

If you value the work of the Othona Community  
will you help it thrive in years to come?

An introduction to Legacies





## The Gift of a Lifetime

If Othona has meant something important to you in your lifetime, would you like to help others enjoy that experience after you are gone? You can do this by leaving a gift in your Will – a Legacy (also called a bequest). Sometimes, as well as helping the charity, this can bring tax benefits for your heirs.

This is not just something for the wealthy. Many of us need to watch our cash carefully day by day, but have significant assets – housing, savings and so on – which we would like to serve a positive purpose after our death. Making a Will is a good idea. It will help protect the people you care about, as well as benefiting the good causes you believe in.

## Supporting Othona

For a charity like Othona, legacies are a vital resource, especially when it comes to renewing our buildings. Both the Norman Motley Building at Bradwell-on-Sea and the Lodge at Othona West Dorset were only made possible with significant help from legacies. Similar generosity will be crucial if our community’s centres are to go on serving as the places of welcome and retreat so many of us have come to love. Legacies can be as large or as small as you like. Whatever you give really will be appreciated for what it is – a gift from the heart.

## How to Make a Will

If you have not made a Will, the prospect may be daunting. But it need not be complicated. We suggest you use the services of a solicitor or other professional adviser, who can give you a quote for fees in advance. (Do-it-yourself Wills are possible and cheap, but can lead to complications.) They will help you work out what you have to leave.

Then decide who you want to benefit: perhaps your family, friends and any favourite charities. You will need to choose executors to make sure the Will is carried out. They can be professional advisers, friends or family members, or perhaps one of each. When your Will is made, keep it in a safe place and tell your executors where it is!

## How to Update an Existing Will

It makes sense to review your Will at intervals. Your circumstances may have changed. If you have married, re-married or entered a civil partnership, your previous Will is no longer valid. Divorce or the death of a spouse can mean a Will needs changing. Perhaps you have moved house or someone mentioned in your Will has died. Your solicitor can advise you how to update your Will quickly and cost-effectively. When you do this it should be easy to add a legacy to Othona or any other charity you support.

## Making a Legacy to Othona

Here is a simple form of words you could take to your solicitor:

**“I bequeath to the Othona Community (“the Community”), registered charity number 1154204**

- \* **the sum of £.....**
- \* **..... per cent of my estate (a percentage may hold its value, while a set amount is vulnerable to inflation)**
- \* **..... per cent of the residue of my estate (all that is left after your debts are cleared and specific legacies paid out)**
- \* **delete two above as appropriate**

**“I wish this to be used by the Community for the benefit of work**

- \* **at its Bradwell-on-Sea centre**
- \* **at its West Dorset (Burton Bradstock) centre**
- \* **generally at the discretion of the Othona trustees.”**
- \* **delete two above as appropriate**

If you do include Othona in your Will, we hope you’ll tell us, so that we can acknowledge your generosity. If you have particular wishes about how we might use your legacy, Othona’s trustees will be glad to know of them. You can do all this by writing in confidence to The Community Treasurer, c/o Othona West Dorset, Coast Road, Burton Bradstock, Bridport DT6 4RN



[othonawestdorset.org.uk](http://othonawestdorset.org.uk)

[othona-bradwell.org.uk](http://othona-bradwell.org.uk)

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The Othona Community registered charity number 1154204  
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