

Dolbelydr, Denbighshire

The Landmark Trust

BE PART OF AN
ENDURING LEGACY

An enduring legacy

The Landmark Trust is one of Britain's leading building preservation charities. Since 1965 it has been rescuing extraordinary historic buildings from dereliction, and giving them a vibrant new life as places everyone can enjoy now and for generations to come.

It has rescued nearly 200 buildings, from royal castles, manor houses and extravagant follies to fishermen's cottages and remote island lighthouses. Without the Landmark Trust's help, and that of its supporters, many important buildings would have been lost forever. The money we raise from letting each building pays for its upkeep and ensures that the buildings will never again fall into decay.

The details included in this guide are intended as an introduction only and Landmark strongly advises anyone making or changing a Will to seek professional advice.

All the buildings illustrated in this guide have either been bequeathed to the Landmark Trust or benefited from legacy gifts in their rescue.



Piecing together Dolbelydr's internal timber frame.



Following major restoration work, Dolbelydr is welcoming successive visitors and now has a sustainable future.



Astley Castle, Warwickshire showing the rescue scheme and the completed interior.

Rescue, restoration and education

Landmark tends to take on small to medium sized buildings and we have long championed the humble and functional as well as the more exotic. We aim to preserve texture and personality by repairing rather than renewing, and retain as much as possible of the original fabric. By using traditional skills and providing opportunities for craft apprentices, we promote the survival of ancient crafts whilst aiming for pleasing and sympathetic buildings that people can use as well as admire.



Much can be learnt from living in our buildings. We provide a History Album which explores its history and that of its former inhabitants, as well as explaining how we have approached the restoration. Every building is illuminated by its own collection of carefully chosen books, and many have booklets written for the children who stay, so as to encourage them to make discoveries of their own.

A visit by a local school to Astley Castle.

Why your legacy gift is vital

In Britain 10,000 listed buildings are officially designated 'at risk' and their future is uncertain. Each year we are unable to rescue many endangered buildings simply because we do not have the funds to restore them. We depend on the generosity of individual supporters to fund each new project. They help us preserve remarkable buildings and ensure traditional skills are kept alive for future generations.



An apprentice laying brickwork at Astley Castle.

What past legacies have helped us achieve

Legacies are immensely important to Landmark. Some have enabled us to purchase buildings and others have helped towards restoration costs. Legacy gifts have also funded evaluation studies for potential projects, allowed us to recreate important interiors, or been used to purchase furniture and books.

While most of our buildings are let for holidays our work is also supported by the Landmark Legacy Estate. These are well-loved buildings that have passed into our stewardship in the knowledge that we can be relied upon to care for them and retain their essential character. Many come to us as legacies and are then managed by us as tenanted property, a solution that both provides Landmark with a valuable and reliable income stream, and allows such buildings to continue to fulfil their role as residential property in a local community.

We will always work with prospective donors in such cases, both to understand their wishes and explain our approach with these gifts.

Landmark Legacy Estate

Forge House in East Sussex, a grade II listed, 17th-century half-timbered cottage, was bequeathed to Landmark by siblings Robin and Dorothy Watts, who lived here together for many years. Their bequest included some furniture and repair funds for the house. Now let to tenants, Forge House guarantees a handsome annual contribution to our income.



“Landmark buildings - large, small, historical or pure folly - have provided me with such pleasure, they must be preserved for future generations. A legacy is my contribution to this noble objective.”

Fred Ledden, legacy supporter.

"Over 20 years ago I was taken by a friend to Dolbelydr. She had tried unsuccessfully to interest organisations in its restoration. Sadly she died before Landmark's involvement. What a loss Dolbelydr would have been. My money may just tip the balance in another restoration."

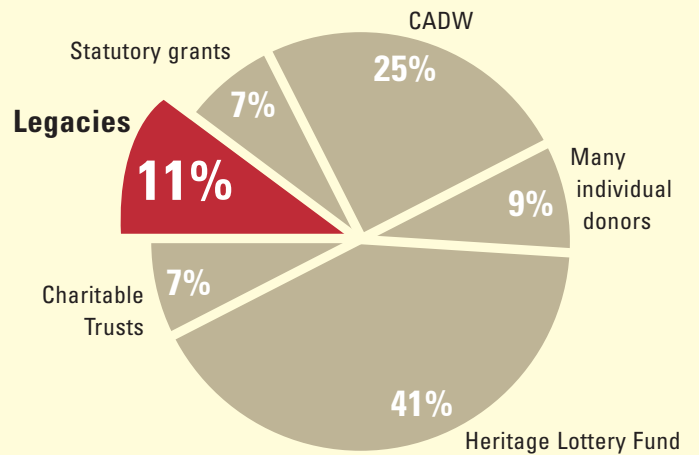
Patricia Badland, legacy supporter



Dolbelydr was a roofless ruin.



The solar at Dolbelydr, Denbighshire



How the acquisition and restoration was funded at Dolbelydr.

You too can leave an enduring legacy

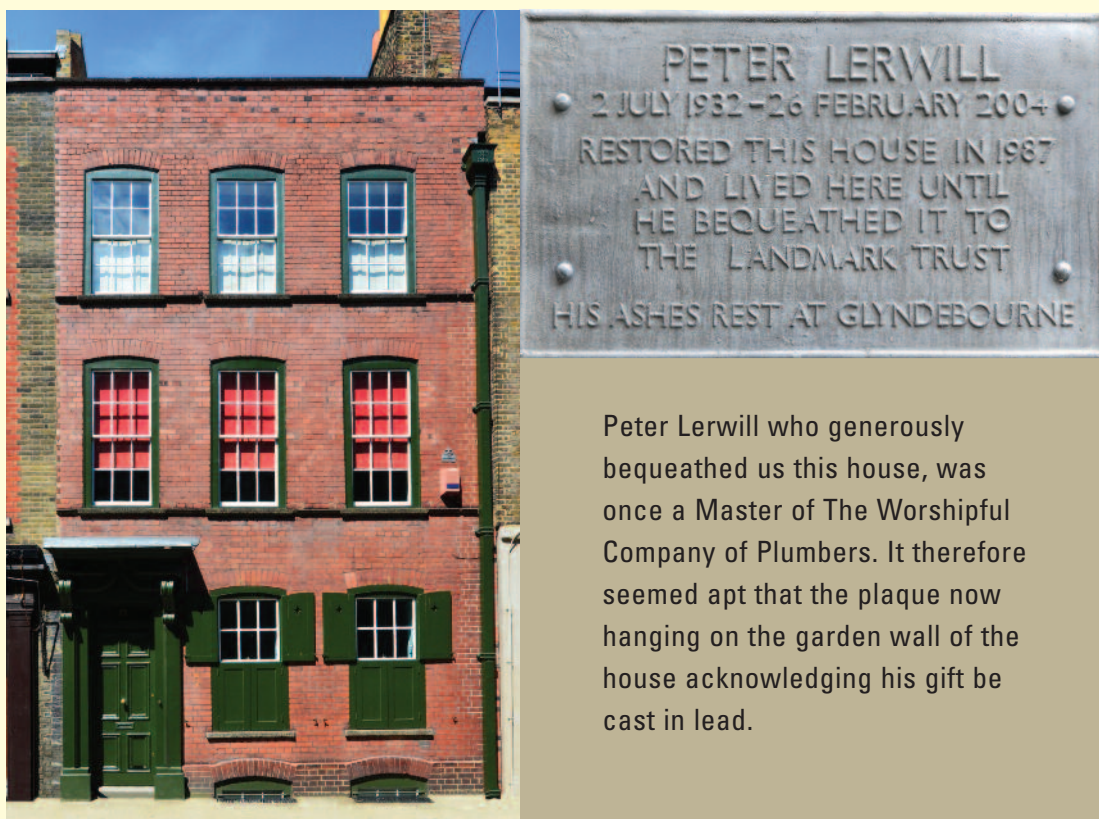
Large or small, every legacy is valuable to Landmark and makes a real difference to our work. Some have been expressed as a specific sum of money, some as part of an estate or the residue after other bequests, while others have been in the form of property or furniture. Depending on the wishes of the donor, a legacy can either be retained and used, or sold to raise funds for our work.

In turn, your legacy gift could help in making an enduring contribution to the rich architectural heritage that surrounds us.

How we will acknowledge your gift

If, as we hope, you do decide to remember Landmark in your Will, as a small gesture of our appreciation we offer you the opportunity to become an Honorary Friend. Landmark Friends are a group of enthusiastic supporters who are more closely involved with Landmark and who are able to experience a wider range of our work and buildings than is otherwise available, through various events, receptions at Landmarks, and special interest days. Honorary Friends are also invited to other bespoke events.

In addition, all legacies received are acknowledged in the Landmark Commemorative Book, held at our offices at Shottesbrooke. Where a legacy is used to help with the acquisition or restoration of a Landmark, acknowledgment is made in the literature associated with the building. In a few cases, the bequest has been appropriately reflected within the Landmark itself.



Peter Lerwill who generously bequeathed us this house, was once a Master of The Worshipful Company of Plumbers. It therefore seemed apt that the plaque now hanging on the garden wall of the house acknowledging his gift be cast in lead.

“What more deserving organisation to remember in your Will – a source of vivid memories, a unique force in conservation AND a charity.”

Chris and Penny Cleland, legacy supporters.



Sackville House, West Sussex, above and below, was bequeathed to us by Ursula Webb. Her brother, Father Benedict, wrote saying "Nothing would give our family more happiness than to know that the future of Sackville House is assured".

The importance of making a Will and keeping it updated

Making a Will ensures that your estate goes to the people and causes you care about. It is also useful when considering inheritance and other tax planning issues.

If you die without making a Will the law governs how your estate is distributed. Your family and friends may also face significant legal costs when attempting to solve some of the problems which intestacy can cause.

Making and changing a Will is not difficult but Landmark always recommends that you seek professional advice.



Preparatory steps before making your Will

1. Assess the value of your estate

Prepare a list of your assets (e.g. property, personal possessions) and your liabilities (e.g. mortgage, loans) plus anything which belongs to you jointly with another person. This will help your adviser establish whether your estate may be liable to Inheritance Tax.

2. Who would you like to benefit

Establish the names and addresses of family, friends, charities and other organisations who you wish to include in your Will and consider what is to happen to your estate should one of those beneficiaries die before you.

3. Seek professional advice

It is advisable to consult a solicitor or other professional adviser who will give you personal, confidential guidance and advice specifically relating to your own circumstances.

4. Executors and Witnesses

An Executor ensures that your wishes are carried out in accordance with your Will and it does not matter if they are also beneficiaries of your Will. You can appoint professional advisers, such as your solicitor, although they will charge a fee. Your Will should be signed in the presence of two witnesses and your solicitor or adviser can usually make arrangements for this to be carried out.

5. Inheritance Tax

The first part of any estate is free from Inheritance Tax, although the threshold at which this starts is liable to change. Currently anything given to a legal spouse (including those joined under a Registered Civil Partnership) or a UK charity is absolutely free of Inheritance Tax and including these in your Will may help reduce the liability to tax. Your solicitor or adviser will be able to suggest the most tax efficient planning methods in your particular circumstances.

6. Keeping your Will in a safe place

It is good practice to leave your original Will with your solicitor or your bank, with a copy at home. Tell your Executors where the Will can be found or you may consider giving them a copy.

7. Changing your Will

It is important to keep a Will up to date and periodical reviews, every five years, are recommended, especially if personal or financial circumstances change. Simple additions or amendments can be easily made by codicil. A draft codicil form is enclosed for your use.

Be part of an enduring legacy

Can you help us rescue more endangered buildings for future generations to enjoy? A pledge form is included in the pocket opposite, which will be treated with the strictest confidence. We stress that this promise is only a statement of your present intentions, is in no way legally binding, and can be varied or withdrawn at any time.

Other information included in the back pocket of this guide:

- Glossary of legal terms
- Draft codicil form
- Suggested wording for inclusion in your Will



If you would like to speak with someone, in confidence, please contact:

Mrs Linda Millard

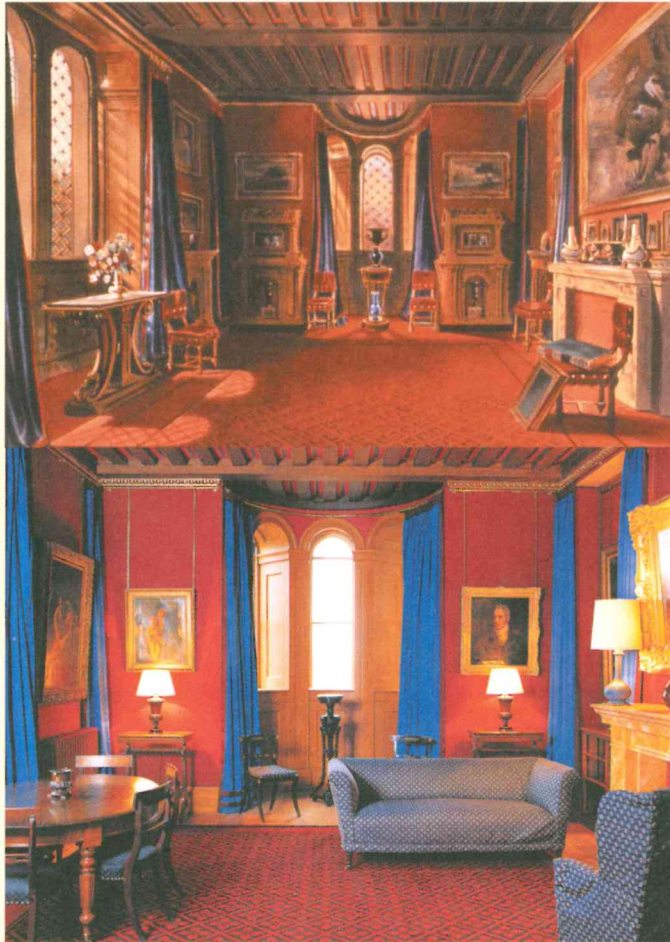
lmillard@landmarktrust.org.uk

Tel: 01628 512122



Field House, Gloucestershire, is a handsome stone house which was left to us with the surrounding land by Eileen Jenkins, who had lived here for the previous 20 years.

Right: *Freston Tower, Suffolk, is a Tudor lookout tower, overlooking the River Orwell.*



Initially, due to budget constraints, Landmark's aim was to be one of simple repairs to restore the historic architectural spaces created by William Beckford. Any embellishment of the interiors, depicted in the lithographs by Willes Maddox, was to be left for future fundraising. At this time we received a legacy gift from Mrs Gladys Theodorson, which was used to reinstate Beckford's rich interiors.

The Landmark Trust

Shottesbrooke Maidenhead Berkshire SL6 3SW

www.landmarktrust.org.uk

Adding a codicil to your Will

If you have already made a Will you can make a simple addition to include the Landmark Trust by making a codicil to your existing Will.

We do advise that you seek professional advice from your solicitor or legal adviser when you make your Will or Codicil, so that your intentions can be fully carried out. Please use the wording below as a draft and not as a final copy to be signed. Take this to your solicitor so they can check the wording against your current Will. Please do not write on or amend your current Will, as it could become invalid.

For further details please contact Linda Millard, at lmillard@landmarktrust.org.uk or telephone her direct line 01628 512122.

Please take this form to your solicitor

Draft codicil to an existing Will

I (name) of
..... (address)

declare this to be a Codicil to my Will dated /..... /.....

In addition to any legacies given in my said Will I give to The Landmark Trust, Shottesbrooke, Maidenhead, Berkshire, SL6 3SW, a charity registered in England and Wales (243312) and Scotland (SC039205) a share of of my estate or the sum of £ and /or
..... (a specific item) to be used for general purposes and I declare that the receipt of the Treasurer or duly authorised officer shall be a full and sufficient discharge.*

In all other respects I confirm my said Will and all other codicils thereto.

*Please complete as required and cross out those options not required.

Signed

Signed by the testator as a First Codicil to the Will in our presence and then by us in his/hers.

Witnessed by:

Witnessed by:

Signature.....

Signature.....

Name.....

Name.....

Address.....

Address.....

.....

.....

Occupation.....

Occupation.....

Date /..... /.....

Date /..... /.....

Remembering the Landmark Trust in your Will

Landmark is grateful for all types of legacy gifts. The following wording can be used when remembering the Landmark Trust in your Will.

If you have already made a Will you can make a simple addition to include Landmark by making a codicil to your existing Will – see our enclosed ‘Adding a codicil to your Will’ form.

Your solicitor or other adviser can help you decide which is most appropriate for you. Please do not write on or amend your current Will, as it could become invalid.

For a Residuary Legacy

We strongly recommend that you seek professional advice if you wish to leave a share, or all, of your residue to the Landmark Trust to ensure the correct wording for your own particular circumstances. Residuary gifts can be complex, depending on how many there are and if the intended recipients are a mix of exempt or non-exempt beneficiaries.

For a Pecuniary Legacy

“I give free of tax to the Landmark Trust, Shottesbrooke, Maidenhead, Berkshire SL6 3SW (Registered charity in England & Wales 243312 and Scotland SC039205) the sum of £ for its general purposes.”

For a Specific Legacy or an item or a building

“I give free of tax to the Landmark Trust, Shottesbrooke, Maidenhead, Berkshire SL6 3SW (Registered charity in England & Wales 243312 and Scotland SC039205) my for its general purposes.”

If you wish your legacy to be used to support a specific part of Landmark’s work, for example a specific property or region of the country, we suggest adding the following words after the word ‘purposes’, “and it is my wish that the same be used to further the work of the Landmark Trust in caring for
..... (including the name(s) of the building(s) concerned).”

In cases where a legacy is for a specific part of our work we do ask that you contact us before finalising your Will to ensure that your wishes can be met.

Private and confidential Enquiry and pledge form

We would like to acknowledge and thank you if you have remembered the Landmark Trust in your Will. Please complete the form below and if you would like any further information.

I have left a legacy to the Landmark Trust in my Will.

I intend to leave a legacy to the Landmark Trust in my Will.

I would like to speak to the Landmark Trust about my Will.

My telephone number is _____

Thank you, I have everything I need to know.
Please do not contact me again about legacies.

Title _____

Full name _____

Address _____

Postcode _____ Phone _____

Email _____

Tick this box if you are happy to receive information from the Landmark Trust by email.

Data Protection Act: We promise that any information you give will be used for the purposes of the Landmark Trust only. If you do not wish to be contacted with information about our work please tick this box. We may occasionally send you information about products and services developed by third parties in association with the Landmark Trust. If you do not wish to receive this information, please tick this box.

Please return the completed form to:

**Mrs Linda Millard
The Landmark Trust
Shottesbrooke
Maidenhead
Berkshire SL6 3SW**

Or email Linda at lmillard@landmarktrust.org.uk

Glossary of legal terms

Administrator

Those appointed to administer an estate where there is no will or executor, often solicitors.

Beneficiary

An individual or organisation who will receive a gift in your Will.

Codicil

A document executed by you, to add to, or alter a Will previously made by you.

Chattels and moveables

Your possessions, including your furniture and car.

Substitutional legacy

This provides that Landmark shall receive any legacy or residuary gift left to another beneficiary /other beneficiaries who have predeceased you or where the legacy or gift fails for some other reason.

Estate

All your possessions at the time of your death, including money and property.

Executor/Executrix

The person who is appointed by you to make sure the instructions in your Will are carried out. An Executor can also be a beneficiary.

Inheritance tax

The tax levied on your estate at date of death. (This includes the market value of your house when you die).

Intestate and intestacy (partial intestacy)

You are said to be intestate if you die without making a Will. Intestacy is the name for this situation. Partial intestacy occurs if there is a valid Will but it does not say how all the deceased assets should be distributed.

Legacy/bequest

A gift left to a person or organisation in your Will.

Life interest or reversionary legacy

A two-stage form of legacy in which the first beneficiary, the life tenant, is given, the use of your house or the interest on your bank or building society account during their lifetime. After their death, the house or capital passes to a second beneficiary, the reversionary beneficiary, named by you in your Will. Quite often a charity is the second beneficiary.

Pecuniary legacy

A pecuniary legacy specifies a fixed sum of money normally paid free of inheritance tax.

Power of attorney

A legal document which authorises one or more people to handle another person's financial affairs (including property, shares, money, etc), either generally or in relation to specific items.

Probate

A paper certificate granted by the Probate Court that states the Will of a deceased has been stated as valid and registered with the Court and the administration of that deceased's estate has been given to the executor named in the Will.

Residue

The sum that is left from your estate when all debts, tax charges and gifts have been deducted. If deciding to leave all or part of the residue to Landmark, even a 1% share, you should take your solicitor's advice on how to draft your Will to ensure that tax exemptions are applied advantageously to your estate as a whole.

Specific legacy

This type of legacy relates to a particular item such as stocks and shares, proceeds of a life insurance policy, property, furniture, jewellery and the like, or a collection of items such as books.

Testator or testatrix

The person who is making the Will.

Witness

A person who signs your Will in your presence, who must not be a beneficiary or a person related to you by birth or marriage or the spouse / civil partner / boyfriend / girlfriend of that relative and / or beneficiary.