

How to leave a Legacy to the MAT



***Pass on your appreciation of
maritime archaeology***

Maritime Archaeology Trust
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www.maritimearchaeologytrust.org/legacy

If you would like further information on our legacy giving please contact:

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Registered Charity No: 900025

How a Gift in Your Will Makes a Difference

The past shapes the future for all generations – you can help protect and promote the maritime archaeology of the Solent, South Coast and whole of the UK through a legacy or an in memory gift. The MAT is a charity and receives no direct government funding. It is through funding support mechanisms such as legacies that it is possible to continue our work. Your gift could help us enormously with the scientific research that underpins our award-winning education and outreach programme.

MAT promotes understanding and enjoyment of maritime heritage through:

- **Investigating:** maritime, coastal and underwater archaeology
- **Engaging:** people, communities and schools through involvement, enjoyment and education
- **Promoting:** hard to reach and inaccessible maritime heritage
- **Protecting:** through supporting heritage management for current and future generations

“Our vision is to inspire current and future generations to understand, appreciate, value and get involved with maritime heritage which is often hidden underwater and hard to reach. Your gift to the MAT can make a significant and lasting difference to help continue work on our fascinating and underrepresented history of interaction with the sea and coast”.

Types of Gifts in Wills

We strongly recommend seeking legal advice when making or updating your will. The MAT does not provide legal advice.

If you leave a gift in your Will to a charity the gift is exempt from inheritance tax.

There are three main types of gifts you can leave to the MAT in your Will. We suggest you speak to your legal adviser to help you make the decision that's right for you. Every gift makes a difference and we want you to leave the right gift for your circumstances.

A residuary gift

This is where you leave the residue of your estate (or a specified percentage of it) after all other expenses, gifts and other costs have been deducted. Many people choose to leave this kind of gift because it helps make sure their loved ones are taken care of first.

A pecuniary gift

This is a gift of a specified sum of money. Over the course of time this type of gift is likely to lose value because of inflation. You might want to consider index linking your cash gift.

A specific gift

This is a gift of a specific, named item. For example, it could be property, antiques, shares or a work of art. The item will need to be clearly described in your Will to avoid any confusion. Your solicitor will be able to prepare appropriate wording.

Suggested Wording for Your Gift

You can choose whether you leave your gift to the general funds of the MAT (an Unrestricted Gift) or whether you would like the funds to be used for a specific activity (a Restricted Gift). Your legal advisor will be able to guide you in the specific wording related to your gift. The following are examples commonly used to provide gifts to charities:

Unrestricted gifts

You can choose to leave an unrestricted or general gift. This type of gift allows a charity to use your gift wherever the need is most great. An unrestricted gift, can be either residuary or pecuniary, an examples of possible wording:

“I give the sum of £ (or specify percentage of estate) to the Maritime Archaeology Trust of National Oceanography Centre, Empress Dock, Southampton. SO14 3ZH (registered charity number 900025) for its general purposes and I declare that the receipt of an authorised officer shall be a full and sufficient discharge for the said legacy.”

Restricted gifts

Leaving a restricted gift means that you choose how or where you would like the gift to be used. You may already know which area of our work you would like to support, or if you would like to discuss this further then please get in contact with the Director using the details on the front cover. An example of wording that could be used to leave a restricted gift:

“I give the sum of £ (or specify percentage of estate) to the Maritime Archaeology Trust of National Oceanography Centre, Empress Dock, Southampton. SO14 3ZH (registered charity number 900025) for its general purpose and I express the wish but without creating any binding trust that this legacy be used in the (specify) areas and I declare that the receipt of an authorised officer shall be a full and sufficient discharge for the said legacy.”

If you have any questions related to leaving a legacy to the Maritime Archaeology Trust then please contact us via the details on the front page.

The MAT does not provide legal advice.

The contents of this document do not constitute legal advice and anyone considering legacy giving are strongly advised to seek professional advice from their own professional advisor.