



Royal Star & Garter

Care with courage

Correspondence address:

Royal Star & Garter
42 York Street
Twickenham TW1 3LJ
020 8481 7676
info@starandgarter.org

Patron: HRH The Princess Royal

INFORMATION FOR EXECUTORS

We appreciate the time and work involved in taking on the role of Executor, and we are grateful for your kind help. We hope that the following information will be helpful.

CONTACT DETAILS

By email: legacies@starandgarter.org

By phone: 0208 481 7676

By post: Legacy Team, Royal Star & Garter, 42 York Street, Twickenham, TW1 3LJ

GETTING IN TOUCH

Please do let us know if you believe Royal Star & Garter has been remembered in a Will. We understand that it may be some time before you are in a position to fulfil the bequest, however knowing about this kind gift does help us to plan for the future.

We would be most grateful for the following details:

- The full name and address of the person who has made a gift in their Will
- Their date of death
- A copy of the Will (or the extract that mentions the gift).

CHARITY DETAILS

Royal Star & Garter may be included in a Will under a former name:

- *The Royal Star and Garter Home for Disabled Sailors, Soldiers and Airmen*
- *The Royal Star & Garter Home(s).*

Wills may also include our former Richmond TW10 6RR or Hampton TW12 2NP addresses.

Our Registered Charity Number is 210119. Our registered office address is: Hughenden Avenue, High Wycombe HP13 5GG.

GIFTS OF RESIDUE

Where Royal Star & Garter has been left a share of residue, we would be grateful for the following:

- A full copy of the Will
- A schedule of estate assets and liabilities once this is available
- Copies of marketing valuations for any property in the estate
- Estate accounts at the end of the administration.

We appreciate that the administration of an estate can take some time. We would be grateful for updates on the progress from time to time, and any potential claims or delays that might arise.

Inheritance Tax and Capital Gains Tax

Charities are exempt from many taxes, such as Inheritance Tax and Capital Gains Tax. Please do get in touch if you have any questions, and we would be happy to help.

Inheritance Tax ('IHT')

There are special rules for the division of any IHT liability between exempt charities and other, non-exempt, beneficiaries (such as family and friends). We would expect the IHT liability to be apportioned solely to those non-exempt shares of residue (as per the Inheritance Tax Act 1984, Section 41) when the estate is distributed, unless the Will specifically states otherwise.

Capital Gains Tax

We would be most grateful to know if you think there is likely to be a gain on the sale of a property and/or investments. In some cases, it may be helpful to appropriate Royal Star & Garter's share of assets directly to the charity before they are sold, in order to minimise any Capital Gains Tax liability. This is a simple paper exercise that can be achieved using a short Memorandum of Appropriation, and we would be pleased to provide a template Memorandum for you to use.

PAYMENT INFORMATION

Our preferred method of payment is by BACS directly to our charity bank account. We will be pleased to provide our bank details securely.

If there is a requirement to pay by cheque, please make the cheque payable to "Royal Star & Garter". Please include a covering note with the name of the estate and your contact details so that we can provide a receipt for your records. Cheques may be sent by post to:
Legacy Team, Royal Star & Garter, 42 York Street, Twickenham, TW1 3LJ.

THANK YOU

Royal Star & Garter is deeply grateful to all those supporters who remember us in their Will. Gifts in Wills are vital to our work, helping to provide the highest standard of specialist care for veterans and their partners, living with disability or dementia now and in the future.

We are also very grateful for all your kind assistance as Executor.