

BRIDGNORTH AND MORVILLE PARISHES TEAM MINISTRY	GUIDELINE No 5
TEAM COUNCIL COSTS AND BEST PRACTICE WORKING PARTY	LEGACY GIVING

## INTRODUCTION

This guidance has been drawn up to help PCCs think about legacies as a potential source of finance. It is largely based on the advice given by the Church of England and Parish Resources and active links to their web sites are provided if you read this on line at the Team Ministry website.

The guidance is in three sections:

PCC Action:

A. Why a PCC should consider legacy giving

- encourage legacy giving
- communicate legacy policy
- make legacy literature available

- Request a free legacy toolkit
- Develop a legacy policy
- Obtain and distribute free information

B. Guidance on receiving a legacy

Obtain and discuss the guidance

C. Why Christians should have a will

Obtain and publicise the information

### A. WHY A PCC SHOULD CONSIDER LEGACY GIVING

Legacies are a lifeline for our parishes. Each year around 5,000 people leave a gift in their will to a Church of England parish. In total, parishes receive around £50 million in legacy gifts each year – gifts to finance mission projects, maintain beautiful church buildings and grow faithful communities.

For many people, leaving a gift in their will is a final opportunity to make a lasting gift to God. It is also a way to make a lasting difference to the future of their church and community. For nearly 500 years the Church of England has encouraged its members to keep their wills up to date. The Book of Common Prayer instructs clergy to remind those who are sick:

*“Let him be admonished to make his will...for the better discharging of his conscience and the quietness of his Executors. But men should often be put in remembrance to take order for the settling of their temporal estates, whilst they are in health.”*

Every year thousands of people die without leaving a will. Making a will and updating it regularly is the only way to make sure your wishes are carried out after your death, giving you peace of mind that you can continue to support the family, friends and causes you love.

#### Encourage Legacy Giving

Many church members would like to know how they could leave a gift to the Church, although they might be reticent about asking. The Church of England has produced **4 Simple Steps** your PCC can take to encourage legacy-giving:-

#### Step 1: Request a free PCC Legacy Toolkit

The Toolkit provides everything you need to launch a successful legacy campaign. Helpful resources include a PCC Guide to Legacy Giving and a short PCC Legacy

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Film on Disc. There are also legacy leaflet, bookmark and poster samples, Bible Passages and Legacy Prayers.

Email your name and postal address to [Eleanor.Stead@churchofengland.org](mailto:Eleanor.Stead@churchofengland.org) for your PCC's free copies.

## Step 2: Make and Communicate a Legacy Policy

A Legacy Policy is an important document that all parishes should have. It allows the PCC to prepare and discuss how they would wish to see a gift used.

### Develop a Legacy Policy

Most people will only leave a gift in their will if they think their church will use it for worthwhile projects, not simply to fund operating costs. A legacy policy allows the PCC to prepare and discuss how they would wish to see a gift used. It can also help to reassure those interested that the PCC has a policy in place.

PCCs should agree a policy on how potential legacy income will be spent, and then communicate it to the congregation. It is also advisable to discourage gifts with a restricted purpose since the needs of a church will change over time.

### An Example Legacy Policy:

*“At St Agatha’s we welcome all gifts in Wills, however large or small, and we promise to use your gift to make a difference in our parish. Our PCC legacy policy is to use gifts to help fund significant development projects; whether buildings, equipment, mission or staff.*

*Since needs change over the years, we encourage you to leave a gift in your Will for the general purposes of the parish rather than for a restricted purpose. We will discuss possible uses of your gift with your executors when the time comes, bearing in mind your known areas of interest in the church (e.g. music, buildings, children and youth, overseas mission or aid) and the church’s priorities at the time.*

*You can be confident that your gift will be used to make a real difference to our future mission and ministry.*

*We will acknowledge gifts in whatever way the donor and/or his/her executors feel most appropriate too. Equally, we can make sure that gifts remain anonymous if the donor prefers.*

*If you would like to talk to someone in confidence about the sorts of purposes your gift might fund, and how (if) you would like your gift to be acknowledged, contact \_\_\_\_\_, on/at*

*\_\_\_\_\_.*  
*If you would like to make a gift to our church in memoriam, please come and discuss this with us too. It can be a wonderful and appropriate way to remember a loved one.”*

## Step 3: Make Legacy Literature Available

Gifts in Wills should be seen as a natural part of Christian giving, but the idea needs to be promoted in a sensitive, low-key manner, drip-feeding messages in different ways across the year. It is important to make quality literature available for those who wish to find out more.

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PCCs can make free information available so individuals can take it away and prayerfully reflect and there is a range of literature available. It can be downloaded from <https://www.churchlegacy.org.uk/>

- A Short Guide to Encouraging Giving through Legacies
  - Leaflets that can be customised to your parish
  - A free pack offering help for church members writing or revising their Wills
- A wide range of resources for parishes including material on legacies is also available at <https://www.parishresources.org.uk/legacies/>

#### **Step 4: Share your Story**

Parishes are encouraged to talk about the power of gifts in wills but gifts in wills should be encouraged, in a sensitive, low-key manner - drip feeding messages in different ways throughout the year. For example, a simple service can highlight the difference gifts have made in the past, and how they can make a difference to your church's future.

### **B. Guidance on Receiving a Legacy**

If a Parochial Church Council (PCC) is a named beneficiary in a will, the PCC are responsible for liaising with the Executor to administer the gift correctly. There are a number of resources below to help the PCC with this process.

#### **PCC Guide to Receiving a Legacy**

This resource provides step by step guidance to PCCs on the process of receiving a legacy; from receiving a legacy notification to providing receipt of payment.

[Click here to view our PCC Guide to Receiving a Legacy](#)

#### **PCC Meeting Following a Legacy Notification**

Once you have received notification of a legacy, it is a good idea to bring the PCC together to notify them of the gift. This resource helps to set out what some of the PCC's principles should be following a legacy notification and the process of prayerfully considering the different possibilities of a specific legacy.

[Click here to view A PCC Meeting: Legacy Notification](#)

#### **Guidance Notes for Lay Executors**

If your PCC is a named beneficiary in a will, you will liaise directly with the Executor/s, who may be a lay person. Sometimes, a PCC Member/s is named as the executor to the estate.

Being an executor isn't easy, the role can be demanding and the individual will often be mourning the loss of the benefactor. This resource provides further information for executors who are administering a legacy left to a Church of England parish.

If your PCC is notified of a legacy, it may be appropriate to send this document to them, to help with the administration process.

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[Click here to view our Guidance Notes for Lay Executors](#)

### **PCC Guide to Inheritance Tax**

Gifts left to charities (also referred to as legacies) are exempt from Inheritance Tax (IHT). This two page resource explains what IHT is and how it applies to a legacy left to your PCC.

[Click here to view our PCC Guide to Inheritance Tax](#)

### **C. Why Every Christian Should Have a Will**

We are God's stewards, entrusted to use His gifts for the good of our family and our church family. In thanksgiving, we should also take will writing seriously – setting your affairs in order and stewarding them wisely to the end of our time on earth and beyond.

#### **Will Writing A6 Booklet**

Everyone knows it's a good idea, but for many of us it's one of those things we never quite get around to doing, and there's always a reason for putting it off. To help motivate Christians, there is a small and succinct A6 leaflet for parishes to use as part of a wider legacy campaign, or with Baptism and Marriage couples. [Click here to view a PDF and download](#)

#### **Free Will Writing and Discount Writing Schemes**

Wills are legal documents, and as small errors can cause big problems, it's vital to have someone legally qualified draft it for you. A standard Will costs around £200 + VAT and the Solicitor should outline the cost upfront before you visit them.

There are however a number of low cost solicitor wills as well as individual and charity based schemes available. [Click here to view our guidance document on Free Will Writing and Discount Writing Schemes](#)

#### **Seeking Professional Advice**

We strongly advise individuals to seek professional advice and to see a solicitor when making or revising their Will. The Law Society provide a database of solicitors authorised to practise by the SRA. Using their postcode search function, you can view a list of all local Solicitors. [Click here to find out more](#)

Some Parishes approach local Solicitor Firms and invite representatives to speak to their congregation about the importance of making a will. Many Solicitors are happy to attend as it provides an opportunity for Solicitors to meet new potential clients