

## **LEGACY POLICY – VETERANS ASSOCIATION**

**Adopted:**

**Review date:**

- 1) The Veterans Association welcomes all gifts in wills, however large or small, and we promise to use your gift to make a difference to our work.
- 2) Our Legacy Policy is to use gifts to help fund our mission to continue to give back to ex veterans and their families by offering support in many different ways, including support with their physical and mental health, finding employment and housing, and signposting to counselling services.
- 3) As needs change over the years, we encourage legators to leave a gift for the general purposes of The Veterans Association rather than for a restricted purpose. We will discuss possible uses of specific gifts with executors when the time comes, bearing in mind the legator's known areas of interest. We will also welcome and value gifts left for specific purposes and encourage legators to discuss any designation prior to including it in their Will. We also value 'in memoriam' gifts to the charity in memory of a loved one.
- 4) When we actively seek legacy donations we will follow the provisions of the Charities Acts, and guidance issued by the Fundraising Regulator, the Chartered Institute of Fundraising and the Charity Commission and act in line with our general Fundraising Policy from time to time. Including (but not limited to):
  - a) that no-one connected with the Charity helps to prepare a will that contains a donation for the Charity. This includes acting as a witness to the will.
  - b) Ensure our dealings with any potential legator are characterised by honesty, openness, and fairness.
  - c) Respect, in all cases, that the decision is the potential legator's and his/hers only.
  - d) Treat all personal information as strictly confidential, unless explicitly agreed otherwise.
  - e) Respecting the sensitivity of the family and friends of the potential legator.
  - f) Paying particular attention when communicating with vulnerable people, who could include, but are not limited to, the following: service users and client groups; the terminally ill; bereaved relatives or friends; and people with learning difficulties and/or disabilities.

- g) Not denigrating another charity in any way, for example, by talking negatively of another organisation.
  - h) If volunteers and/or staff are to be asked for legacies, to make it clear that they are under no obligation to leave a legacy.
  - i) Fundraisers shouldn't take advantage of their employment by the charity to solicit a personal legacy. If a personal legacy is offered in a personal capacity, the fundraiser must disclose the potential gift to their line manager.
  - j) Where any gift might benefit the charity in preference to the legator's own family, make it clear that the charity will not be responsible for any communication with or explanation to the disinherited family members.
  - k) In relation to free and discounted Will schemes as well as requests to pay for Wills, the charity will follow the Charity Commission guidelines as set out in the Charity Commission guidance 'Paying for Wills with Charity Funds'. Fundraisers will not make it a condition that the charity is included in the Will.
  - l) Fundraisers must not exert undue influence on potential legators.
- 5) Unless directly useful in the work and mission of the Charity, any material gifts (e.g. land, books, personal property) will be sold and where possible the money raised will be used in line with the original gift. Where this is not achievable it will be used to support the general purposes of the charity.