

A close-up photograph showing the hands of a young child and an elderly person planting a small green sapling into the soil. The child's hands are on the left, and the elderly person's hands are on the right, both gently holding the plant. The background is a soft-focus outdoor setting with green grass and a blue sky.

Gifts in wills

**Make a lasting
difference**

**On your journey of a lifetime, what
will you leave behind?**

Registered with




**FUNDRAISING
REGULATOR**

Company Number 282555

Registered Charity Number 306122

Adventure. For the first time and a lifetime





Through our network of hostels across England and Wales we deliver memorable, meaningful experiences of adventure and discovery.

Our amazing achievements as a charity are made possible partly because of the generosity of people who leave us gifts in wills. They help us fund breaks for children and families with challenging lives, keep historic buildings open and maintained, and support leading education and work experience programmes. They help us enrich and change lives.

In 1930, YHA was born of social reform with a determination to improve the lives and life-chances of young people lacking access to activity, adventure and fresh air. Today, we continue to make a unique contribution to society. As we advance towards our centenary, we remain committed to ensuring that everyone has access to the outdoors, nature, culture and heritage.

Think of the adventures that have changed your life, a moment that has opened your eyes to a new world or opportunity, where you have met amazing people, had a wonderful time but also gained greatly in terms of personal development. If you've had unforgettable adventures with YHA, please consider leaving a gift in your will to pass on magical moments and keep the gift of travel and adventure alive for future generations.

Because where you go changes who you become.



Conversations about your gift

Leaving money to a charity is a worthwhile, rewarding and generous gesture. However, the first priority of your will is to take care of your family and friends by letting them know how you'd like your possessions and assets shared.

Once you have done this, it is still possible to include an additional gift to a charity close to your heart, such as YHA. Any gift you leave us - of whatever size - will be used to help fund our work and make memories that last a lifetime.

Take time to explain your decisions to your family. This can help comfort them too.

Values, not value

Reinforce that this is an authentic decision based on your passionate belief in the work you're choosing to support.

In 2023/24



800,000+

guests used YHA.



300,000+

were young people.



100,000+

young people went on a residential with their school or youth group.



2,000+

young people and families with challenging lives received supported breaks.



1,000+

active volunteers.

Shared memories

Bring to life the story behind your decision. If you're choosing to leave a gift for YHA in your will, share memories of the adventures you've enjoyed and recall the positive impact of our people, facilities and environments.

Perhaps you've shared magical moments with family members on a YHA adventure - remind them of those special times.

Making a difference

Every penny raised by YHA contributes towards ensuring that we can reach more people, fund breaks for children with challenging lives, support our network of volunteers, keep historic buildings open and maintained and help us enrich and change lives.

Pledging a gift in your will

YHA supporters leave a variety of gifts in their wills - money, share portfolios and sometimes entire estates.

There are many reasons why people choose to leave a gift in their will to a charity.

Even a small gift in your will can help our amazing achievements as a charity.

Talk to YHA



Call us on

01629 700 990



or email us at

giftsinwills@yha.org.uk

Why our work must continue

Every day we see the benefits of YHA's programmes and activities on physical and mental health. And we see first-hand the impact of residential breaks on young people's abilities to develop their social skills, self-confidence, resilience and relationships.

Our hostels are on the doorstep of many of England and Wales' most loved landmarks and landscapes. We care for over 100 unique, often historic buildings and your support means our hostels will still be there for people to enjoy for years to come.

Residentials for young carers

A group of young carers and children, at risk of homelessness, from an inner city school in Manchester attended a residential in the Peak District. At YHA Edale Activity Centre they took part in nature walks and other physical activities that they feel they miss out on at home.

Desiree, 12; Kirsan, 12; and Kensey, 14 all felt that their time away from their caring responsibilities had been hugely beneficial to them.

“

I think the trip was fantastic and all the activities were tiring and fun. I met new people and had a great time.

”

Kensey



Bird hide for YHA Eskdale

YHA Eskdale is a small 46-bed hostel situated at the foot of Hardknott Pass, in the quieter western side of the Lake District. It is a picturesque and beautiful place to walk, hike and enjoy the landscape of the surrounding hills and wilderness.

The hostel is environmentally friendly, using renewable energy in the form of biomass and solar panels. It is also set in 15 acres of private grounds - great for exploring the natural environment. A mapped nature trail complete with a boarded walkway introduces guests to the local flora and fauna, and in June 2014 work started on a field study hide after a generous gift left in memory of David Hardisty by his sisters Marian and Joyce. He loved the hostel and the wildlife in the area. When the hide was opened in April 2015 it was named the David Hardisty Hide. Many guests continue to gain enjoyment from this bequest.



Marian also remembered YHA Eskdale in her will. In 2017, her gift supported the improvement of the reception area, as well as the planting of bulbs and spring shrubs to enhance the grounds.

“

A big plus to the hostel is the superbly designed bird hide in the hostel grounds where you can see a large variety of birds coming to the feeders at close range - we counted eight different species on our visit.

”

YHA guest, Tripadvisor



Tax effective giving

Charitable gifts can increase significantly when tax effective giving rules are applied.

Charitable gifts can affect Inheritance Tax on larger value estates and additional tax breaks are available in some circumstances to people leaving a legacy to charity.

What's the tax effect of giving?

You'll want to understand how taxes could affect a legacy gift. Tax could have a significant effect on the value of your estate especially if your net assets amount to more than the Nil Rate Band.

You are unlikely to be liable for Inheritance Tax on a legacy if your estate passes to a spouse or a civil partner and both are domiciled in the UK.

Married partners, including civil partners, have individual allowances. One partner can benefit through the unused allowance of their deceased spouse. So if one partner dies and £30,000 of their allowance is unused, their surviving spouse will inherit the remainder of the allowance.

Tax is a complicated topic and you will want to make sure that the legacy you leave to an organisation you support is as financially efficient as it can be.

Next steps

Find out more by visiting

yha.org.uk/gifts-in-wills

or calling us on

[01629 700 990](tel:01629700990)

For information about all taxes - including Inheritance and Corporate

gov.uk/donating-to-charity



Help is at hand

YHA can help you estimate the size of your estate and leave information with your executors. We can also suggest a suitably qualified solicitor or you can take advantage of our partnership with will writing services by making a will completely free of charge, saving yourself worthwhile cash.

Visit

yha.org.uk/gifts-in-wills



Leaving a gift in your will

We understand that, when you consider a will, your loved ones come first. So, your priority will be making sure that they are provided for.

However, many people also choose to leave a charity gift to an organisation that shares their values - or has delivered life-changing experiences and life-long memories.

Have your say on your estate

We should all make a will regardless of how much money we have or property we own. It's the only way of ensuring our wishes are carried out.

Your will can be as simple or detailed as you choose. It can outline your preferred type of funeral and make sure your estate - including any legacy gift you choose to leave - is dealt with according to your exact wishes.

YHA advises you choose your executor(s) and seek professional help through a qualified and experienced solicitor or use our free will service.

Why a will is important

If you die without evidence of a will you're intestate. It means your estate and possessions will be subject to the rules of intestacy and that can lead to complex, lengthy and emotional legal and financial discussions at an already difficult time for your family.

If you have no immediate family and don't leave a will, the Government may receive your assets.

Changing your will

You should review and refresh your will to reflect any changes in your life - or the lives of those mentioned in it.

You may not need to completely re-write it. A codicil is a simple legal addition that can update some changes.

Keep your will in a safe place, let your executors know where it is and keep a second copy with your will writer or solicitor.

Choosing your gift

There are different types of legacy gifts. These include:

- **Pecuniary legacy**

A specific amount of money.

- **Residuary legacy**

A gift or a share of your estate after costs and pecuniary gifts are made.

- **Specific legacy/bequest**

The gift of a particular item such as shares, chattels or your entire estate.

Writing a will ensures your estate - including any charity gift you choose to leave - is dealt with according to your exact wishes.

The size and type of your gift will usually depend on your personal circumstances.

A residuary legacy is an excellent way of avoiding having to quote specific sums of money or individual items. So, you won't need to keep updating your will if your financial or family situation changes. For example, you may decide to leave 50% of your estate to an individual organisation. The actual value of the gift may rise and fall due to changes in your circumstances and inflation. However, the percentage you chose will be calculated on any amount left.

YHA details you should include in your will

Company Number 282555

Registered Charity Number 306122

In Memory gifts

YHA is delighted to accept gifts in lieu of funeral flowers or for anniversaries and birthdays. These can be a great comfort for family members particularly if the deceased had happy memories of hostelling adventures and travel or was involved with the movement for many years.

Via our website you can also dedicate a donation to a loved one, create a tribute fund or add a message to our dedication wall. To find out more call 01629 700 990 or visit yha.org.uk/in-memory.





The right words

What should I say in my will?

These are the kind of words you could use if you choose to leave a gift to YHA in your will.

Residuary legacy

I give all (or a % share) of the residue of my estate to YHA (England & Wales), Trevelyan House, Dimple Road, Matlock, Derbyshire DE4 3YH. Registered Charity Number 306122, for its general charity purposes.

I direct that the receipt of the treasurer or duly authorised officer shall be a valid and appropriate form of discharge.

Pecuniary legacy

I give the sum of (amount in words and figures), free of tax to YHA (England & Wales)... [continue as above].

Specific legacy/bequest

If you wish your gift to be used in a specific area or for a particular project just insert, 'and express the wish it be used for...' YHA will make every attempt to comply with your request.

The legal words

Some terms that might be used when writing your will

Assets

Items of value owned by the deceased, including holdings of bank accounts and shares, property, furniture etc.

Beneficiary

Someone who will benefit from your will.

Bequest

A gift in will (other than land or buildings).

Chargeable estate

An estate or portion of an estate whose value is above the threshold for Inheritance Tax.

Charging clause

A clause in a will that permits a solicitor or other professional to charge for work in a personal capacity, or undertaken, which did not require the services of a professional. If no such clause is included, the Trustee Act 2000 implies its inclusion.

Chattels

Moveable tangible articles of property.

Codicil

A simple document incorporating changes to a will, either by adding, deleting or altering the provisions made in the will.

Deed of variation/family arrangement

A variation to a will of intestacy after death – usually as a tax planning device.

Estate

All ownership and monies, vested or contingent both in possession and reversion that are capable of being disposed by the will.

Continued...

Executor(s)

The person(s) you choose to be responsible for administering your will.

IHT (Inheritance Tax)

Tax levied on the value of an estate, which exceeds a threshold. The amount is sometimes altered each year following the Budget. It may increase in some circumstances if your spouse has died before you - seek advice about this.

And finally

We know leaving a gift in your will is a big decision so if you would like to speak to us or have any questions, please get in touch and we can help guide you through the process.

Intestate

The term used when someone dies without leaving a will.

Probate

Authorisation confirming that the will is valid and your executors can carry out your wishes.

Contact us

To request more information about leaving a gift to YHA in your will or to find out more about our free will writing services, you can talk to us by calling 01629 700 990 or you can contact us via our website yha.org.uk/gifts-in-wills. Make sure the causes you care about are supported well into the future. Thank you.



“

I have decided to leave a gift in my will to YHA so that young people can continue to enjoy the freedom of travel and adventure as I did in my youth. I have enjoyed some wonderful YHA holidays in amazing places. As a keen walker and cyclist when I was younger, the open spaces I was able to visit through YHA all have very special memories.

”

Bruce

“

For my legacy I wanted to support organisations that are doing a good job and that are close to my heart.

”

Jo

“

The bulk of what I have to leave will be shared between my children and their families, however there are two charities that are very close to my heart because of the work they do - one is YHA.

”

Karen

We are YHA.

We transform young lives forever through travel and real adventure.

Because where you go changes who you become.

stay | join | give | volunteer yha.org.uk

YHA (England & Wales), Trevelyan House, Dimple Road, Matlock, Derbyshire DE4 3YH

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