

LEGACIES AND BEQUESTS

By leaving a gift in your Will to The Thames Valley & Great Western Omnibus Trust (TV&GWOT), you can help keep alive the rich history and memories of passenger road transport from Paddington to Penzance through the Thames Valley and West Country. If this is something you are considering, the information below is intended to provide useful guidance.

Principal operations within the Trust's scope include:

-  Great Western Railway Road Motors
-  National Omnibus & Transport Company
-  Western and Southern National Omnibus Companies
-  Royal Blue Express Services
-  Reading Corporation
-  Thames Valley Traction Company

As a registered charity neither TV&GWOT nor your beneficiaries need pay any inheritance tax on bequests from your estate.

Thank you for considering TV&GWOT as a beneficiary in your Will. Legacies whatever size and whether financial or material are received with gratitude and respect. They make a valued contribution and help preserve the collection for future generations.

Legacies can be a sum of money or the residue of your estate (once bequests to family and friends have been made and all other dues paid). Bequests might be your transport collection or specific items from it, or other things like stocks and shares.

Legacies to TV&GWOT's 'general charitable purposes' go to the education of the public in the transport heritage, through the preservation of the collection and mounting of events for people to enjoy. Legacies are not spent on administration. You can add a rider to guide TV&GWOT's Trustees/Directors expressing your preference for how the legacy is used. This will be respected as far as practicable but allowing discretion ensures a legacy cannot be invalidated due to unforeseen circumstances.

Setting your wishes down in a Will ensures your intentions will be met. It gives you peace of mind and is helpful to those eventually dealing with your estate. We recommend that you consult an expert when drawing up your will but suggest the following alternative forms of wording for you to consider:

Legacy of cash:

I give free of tax to the Thames Valley & Great Western Omnibus Trust (Registered Charity No. 1125980) whose registered office is at Ledger Farm, Forest Green Road, Fifield, Maidenhead SL6 2NR, **the sum of £_____** (in figures and words) to be used for its general charitable purposes. I declare that the receipt of the Treasurer or other proper officer of the said Trust shall be full and sufficient discharge to my Executors.

Legacy of residual estate:

Subject to the payment of my debts and testamentary expenses I give the whole of my estate not otherwise disposed of by this my Will to the Thames Valley & Great Western Omnibus Trust (Registered Charity No. 1125980) whose registered office is at Ledger Farm, Forest Green Road, Fifield, Maidenhead SL6 2NR, to be used for its general charitable purposes.

Bequest of Collection/Item(s):

I give free of tax to the Thames Valley & Great Western Omnibus Trust (Registered Charity No. 1125980) whose registered office is at Ledger Farm, Forest Green Road, Fifield, Maidenhead SL6 2NR, ***my collection of transport memorabilia and ephemera***, to be retained or disposed of at the discretion of its Trustees in furtherance of the Charity's charitable purposes.

***Notes*:** This may be edited to describe your collection or to identify specific item(s). In such instances it can be helpful to your Executors and to ensure your intentions are followed if you list or indicate the location of the items you wish to bequeath in supplementary instructions.

THE THAMES VALLEY & GREAT WESTERN OMNIBUS TRUST

Registered office: Ledger Farm, Forest Green Road, Fifield, Maidenhead, Berkshire SL6 2NR

Website: www.tvagwot.org.uk

Email: enquiries@tvagwot.org.uk

Company Registered in England No. 5035702

Registered Charity No. 1125980

Notes continued:

If you are bequeathing material (including photographs) is your own work and thus your own copyright, it is important to specify separately in writing that you transfer this right to TV&GWOT (if that is your intention). If material is not by you, then this should also be made clear to avoid inadvertent infringement of copyright.

If you are considering bequeathing a vehicle to TV&GWOT the Trustees would particularly welcome early discussion of potential arrangements. There may be a cost in transporting it to a Trust site and/or for its ongoing storage and care and it will be important for planning to be in place with sufficient provision in your Will to ensure that your wishes, the vehicle and the Trust are all protected when the time comes. Discussions would be in strict confidence.

Amending your Will by codicil

If you already have a Will you can make a Codicil to include a new bequest to TV&GWOT which should be witnessed by two people.

Example wording could be:

I.....(your name) of (address) declare this to be a first/second/.....# Codicil to my Will dated.....

insert number as appropriate

In addition to any legacies given by my said Will, I give free of tax to the Thames Valley & Great Western Omnibus Trust (Registered Charity No. 1125980) whose registered office is at Ledger Farm, Forest Green Road, Fifield, Maidenhead SL6 2NR, **the sum of £_____** (in figures and words) to be used for its general charitable purposes. I declare that the receipt of the Treasurer or other proper officer of the said Trust shall be full and sufficient discharge to my Executors.

In all other respect I confirm my said Will and any other codicils thereto.

In witness whereof I have hereunto set my hand this day of (month)(year).

Signed by the said.....(your signature) as a codicil to his/her last Will in the presence of us who at his/her request in his/her presence and in the presence of each other have hereunto subscribed our names as witnesses

Signature of Witness.....

Witness Name.....

Witness Address.....

Signature of Witness.....

Witness Name.....

Witness Address.....

If you have queries on any aspect of donations, legacies or bequests for the benefit of TV&GWOT, please do not hesitate to contact the Trustees for a confidential discussion without commitment - contact details are on Page 1.