

# Living Heritage



THE WOODLAND TRUST LEGACY NEWSLETTER  
January 2000

The Woodland Trust  
Autumn Park Grantham Lincolnshire NG31 6LL  
Registered Charity No. 294344



## *An introduction from our Chief Executive, Mike Townsend*



Woodland is one of the most potent symbols of nature in the British countryside, retaining a unique place in the hearts of

many people. I still remember the woods of my childhood and even individual trees in which I played and where my love for nature grew.

If we are to ensure that future generations are able to enjoy our woodland heritage, it is essential that it is protected and cared for.

A legacy to the Woodland Trust creates the opportunity for us to build a secure future for woodland, for wildlife and the countryside. We can rescue woodland suffering from neglect or mismanagement, and secure woodland threatened by development and destruction.

That's why the legacies we receive are so valuable. They help support the work we undertake in the care of woods. When you give a legacy to the Woodland Trust, you make a lasting contribution to the conservation of the natural world and the quality of life for the children of tomorrow and their children.

Let me thank you on their behalf.

**Mike Townsend,**  
Chief Executive



*Coed Gwernafon, Llanidloes, Powys  
Safeguarded by a legacy from a supporter of The Woodland Trust in 1991*



Penn Wood, nr Amersham, Buckinghamshire



## Your Questions Answered

**Q** I would like to include a legacy to the Woodland Trust in my Will. Unfortunately, I wrote my lengthy and quite complex Will some time ago and I would prefer not to re-write the whole document. Can I simply make changes to it?

**A** *It is always possible to execute an amendment to your Will. The amendment, called a Codicil, can alter, omit or add anything to your existing Will, so you can avoid all the bother and expense of writing a fresh Will. A copy of our 'Wording for Wills' includes guidelines for wording a Codicil.*

# How is a legacy used?

Penn Wood in the Chilterns is a fine example of how you can leave a legacy of woodland to be enjoyed over the coming centuries.

When the 436 acre (177 hectare) wood in Buckinghamshire was threatened with destruction to create a new golf course in 1993, it galvanized the local people into forming The Friends of Penn Wood.

First, they convinced English Nature that the wood dated back at least to the Domesday Book, and it was designated as Ancient Woodland. However, this didn't deter the developer and in 1994 The Friends of Penn Wood approached the Woodland Trust for help.

After various setbacks a successful campaign by the Woodland Trust finally secured the wood in April 1999.

But how were we able to save it for

posterity? We needed £1.1 million to purchase and manage the wood. A wonderful £208,000 came from five legacies ranging in value from £4,700 to £163,000; the Heritage Lottery Fund gave us £288,000; an exceptional £400,000 came from national and local appeals together with £200,000 from the Woodland Trust's reserves.

Because the five legacies were unrestricted, that is to say the legator had not specified exactly how and where the bequest should be used, this gave us the flexibility to direct the gifts to the most urgent need.

So the trees of Penn Wood have been saved in no small part because several people remembered the Woodland Trust in their Wills and directed that their bequest should be used 'towards the work of the Woodland Trust'.

# Watkins Wood

The perfect way to remember the Woodland Trust's founder

Kenneth Watkins was the Trust's inspiration and pioneer, and when he died in 1996, we immediately started looking for some way to commemorate this man of vision. What more fitting and lasting tribute could there be than a wood created in his name?

So we cast around for a suitable location, only to discover that there was a piece of land available at Wood Barton farm in Devon - right beside Avon Woods, the first hundred woodland acres acquired by the Trust in 1973. We then discovered that an adjacent area of ancient woodland, Aveton Wood, could be rescued from degradation by conifers. It was an

ideal location.

Together, the three woods will become a showcase for woodland creation and conservation, and as it will cover an area of 350 acres (142 hectares), there are great opportunities for creating woodland and for attracting all kinds of wildlife.

A generous £400,000 legacy for use in Devon from Mrs M E Phillips, a member for 20 years, and a considerable response from an appeal to supporters has already started turning Watkins Wood into a reality.

We think Kenneth Watkins would approve.



Avon Woods, Kingsbridge, Devon



## Your Questions Answered

**Q** I would like to leave all my estate to my grandchildren. I am aware that should my estate exceed a certain level, Inheritance Tax will become payable on my death. Can you suggest a way round this?

**A** *It is virtually impossible to predict what the Inheritance Tax level will be in the future. There are currently two bands: no tax will be payable on estates up to £231,000, but anything over attracts 40% tax. One way of avoiding paying this tax is to leave assets up to the value of the "nil tax" rate band to a non-exempt beneficiary such as your grandchildren and leave the remainder to an exempt beneficiary such as your spouse or indeed a charity.*

## But have you the will?

As a member of the Woodland Trust, you clearly appreciate the importance of native broadleaved woodlands. And as you've wandered under the rustling canopy, you've perhaps considered how wonderful it would be to leave some money to keep these woods for future generations.

But have you actually got round to making the bequest? If you have, please contact us because knowing that your bequest exists really helps us plan for the future.

And if reading this issue of *Living Heritage* has prompted you to make a legacy or change your Will to include a bequest to the Woodland Trust, please phone Susan Miller on 01476 581129.

If you have already remembered the Trust in your Will, a very big and warm thank you for such a positive and generous commitment towards the care of woods.

# Stop press

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As part of his recent Pre Budget Report, the Chancellor announced that the tax reliefs on charitable giving will be increased. The changes, which are subject to detailed legislation being enacted, are due to be effective from April 2000.

One of the changes that may be of interest to you is that donors will be able to gift quoted shares and securities to charities and obtain income tax relief on the full market value in addition to the capital gains tax relief that is available at present for gifts to charities.

If you wish to discuss the potential benefits of this change then please contact Julian Purvis, Financial Director on: 01476 581111.



## Your Questions Answered

**Q** I would like to leave a legacy to the Woodland Trust but keep hearing "pecuniary" and "residuary". Could you explain the difference and also advise as to which type of legacy would be more beneficial?

**A** *The Trust is very grateful for all legacies received. A "pecuniary" legacy is a set amount of money decided at the time you write your Will. Its real value will decrease over time due to inflation although this can be overcome by index linking it to movements in the Retail Price Index.*

*The value of a "residuary" gift can only be calculated at death - whatever is left after all debts, liabilities and other gifts have been paid. Generally this kind of legacy is of the greatest benefit to us as its value increases in line with the value of the estate.*

# A lifelong devotion to woodland

## Extracts from a member's letter

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In a recent letter to the Woodland Trust, Mrs. Pat English - a member for 17 years who lives in Somerset - told us about her lifelong enjoyment of trees.

"I love woods! It all started a very long time ago. I looked out of the window one October day and saw the little wood opposite had overnight become a blaze of gorgeous colours. I was overwhelmed!

"I still love to discover the secret places in woods. Each visit uncovers something different, a newly-sprung tiny flower, moss and fern making patterns of light and shade, or the sunlight highlighting hidden depths between the trees.

*" I love woods!...I am very glad to be able to leave a legacy to the Woodland Trust."*

"We cannot, must not, lose more of these natural, peaceful places. A woodland walk is a better antidote to urban stress than any relaxation therapy! These oases of calm and beauty are so valuable, not forgetting the communities of wildlife for whom they are their only home. There is something about the height of trees and the leafy canopy that makes them so inspiring, giving a sense of protection and refuge.

"The Woodland Trust is an admirable body of people devoted to retaining and preserving our woodlands and creating new woods for the future. I have met some of the HQ staff of the Trust, also the field workers who are a dedicated bunch of very friendly, genuinely first-class people, who like to meet and discuss opinions with their members.

"I am very glad to be able to leave a legacy to the Woodland Trust.  
Yours sincerely, Pat English"



## A helping hand with your legacy

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It's now even easier to make a legacy to the Woodland Trust.

If you would like to speak to someone direct or if you would like a copy of our suggested 'Wording for Wills' please contact Susan Miller, our Legacy Manager at Head Office. Alternatively, if you would prefer a member of staff to call and see you at home, this can be arranged.

Please phone Susan on:  
**01476 581129**

who will be happy to help you with any queries that you may have.



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