



THE ULYSSES TRUST

Reg'd Charity No 1170600
www.ulysses-trust.co.uk

A Gift For All Time



Building Confidence | Strengthening Communities | Changing Lives

REMEMBERING THE ULYSSES TRUST IN YOUR WILL

Making a Will is one of the most important things we will ever do. It is a way of providing for the people who have been important to us throughout our life. It is also a means by which we can make an enduring commitment to the causes which have been close to our heart.

Your support for young people, for the Cadets and for the Reserves, through the Ulysses Trust, has helped change lives and communities. Through a legacy in your Will, you can affirm that commitment and help ensure that future generations will always be supported.



A GIFT FOR ALL TIME

Legacies left to the Ulysses Trust can be designated for any of our charitable activities but our priority is to add them to our endowment fund. The capital of this fund will be invested and the income generated will support grants to the Reserves and Cadets for generations to come. It also means the levels of support required by our beneficiaries will not be so reliant on the most recent fundraising results. This is important because when there are economic downturns and fundraising is challenging – that's usually when our support is needed the most.



WHY I'VE LEFT A LEGACY

Our endowment fund has largely been as a result of legacies received from generous individuals wishing to ensure that the work of the Trust is secure. Trust Vice Chairman, Lieutenant Colonel Philip Neame is passionate about protecting the Trust's ability to provide as much support as it can.



"Over the last 25 years, I have been privileged to see how the lives of young people have been changed with the help of the Ulysses Trust. I wanted to make sure that support is available to future generations, when they need it most. With my legacy to the endowment, I know I will help achieve that."

Philip Neame MBE

HOW TO MAKE A LEGACY

A legacy is a great way of supporting the Cadets and Reserves, as it would come from assets, not income. It would not be at the expense of bequests to others, but rather in addition. Leaving a legacy to the Trust may attract two significant tax benefits*. The money you leave could be free from Inheritance Tax. Furthermore, if you leave at least 10% of your estate to charity, the tax rate on your remaining estate could be cut from 40% to 36%.

There are various ways of remembering the Ulysses Trust in your Will or a via a codicil (addition) to your existing Will:

Residuary: where all, or a specified percentage, of the remainder of your estate after providing for family and others, would go to the Trust.

Reversionary: where you leave your assets to a beneficiary to make use of during their own lifetime, after which the assets, or a specified portion, reverts to the Trust.

Pecuniary: a fixed sum of money.

Specific: an item(s) or specified assets (e.g. land, shares, artwork).

We ask that you inform us of your intention by completing the simple form enclosed. It will be kept confidential and does not include any declaration of the monetary value of your bequest.

*As with all financial matters it is important to seek independent professional advice if you are thinking of leaving a charitable gift in your Will.

RECOGNISING YOUR GENEROSITY

If you choose to remember the Trust in your Will you will be invited to join our Odyssey Circle, a society of likeminded people who are similarly supporting the Cadets and Reserves through the Trust.



Members of the Odyssey Circle will receive a welcome from Trust Vice Patron, Viscount Chelsea; our newsletters and Annual Review; and invitations to events with Vice Patrons, Trustees, Ambassadors and in some years, with the Royal Patron. The work of the Trust made possible by your support will be presented and there will be opportunities to meet beneficiaries.

For more information please contact:
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