

Your legacy? It started
the day you joined us



BTO

Inspired by birds,
informed by science

Your legacy?

In a changing and uncertain world, we are becoming more and more reliant on the generosity of our supporters as we work to secure a better future for birds and the natural world. Gifts in Wills are vital to us, ensuring we can continue to carry out the science that makes a real difference for the world we share.



A gift in your Will would enable us to continue to gather the vital evidence, generated by volunteers throughout the UK, that affords us a passionate, authoritative and highly respected voice in nature conservation.

If you do decide to remember us in your Will, you will be giving an invaluable gift; helping safeguard our wonderful birds and their environment for future generations to enjoy.

A handwritten signature in blue ink that reads "Juliet Vickery".

Professor Juliet Vickery
Chief Executive, BTO

An ongoing legacy

With your help, and the data collected by 60,000 birdwatchers, BTO has "*a remarkable impact on policy and practice*", according to a recent review. An external panel recognised our fantastic volunteer base, our rigorous integration of research and monitoring, and our outstanding engagement with a diverse range of audiences. Everyone who counts birds – whether in a garden, walking across a field or looking out across an estuary – is making a difference.

BTO's Garden Bird Feeding Survey, Garden BirdWatch, and BTO/RSPB/JNCC Breeding Bird Survey provide good examples of integration. Volunteers have been monitoring garden birds for 50 years, and these data have been analysed to explain how gardens and the resources they provide have shaped and supported populations. Now, by adding in Breeding Bird Survey data from urban habitats, we are testing how the amount and type of green space influences bird populations. Hopefully this will inform the design and management of our towns and cities, to bring benefits for future generations of birds and people.



At a wider scale, our monitoring programmes have shown the impact that climate change is having on the natural world. Data collected by BTO volunteers demonstrate changes in the arrival dates of summer migrants, shifts in distribution, advances in breeding seasons, and the loss of species such as Nightingale. Our challenge is to use this evidence in ways that can shape the development of sectors, such as energy generation and farming, for the benefit of birds.

As the world looks for sustainable solutions, BTO is playing a leading role in understanding the potential impacts of offshore renewables on our internationally important seabird populations, monitoring the effectiveness of agri-environment schemes for farmland birds, guiding large-scale tree-planting, to avoid areas important to breeding species, such as Curlew, and much more. Further afield, we are tracking international movements of red-listed species, such as Cuckoo and Spotted Flycatcher, and working with partners across Europe, in Africa, and globally.

Wherever BTO operates, the currency we use is the data that our supporters provide.



WRITING A WILL

Making a valid Will is one of the most important things you can do for your loved ones to help them avoid added stress at an emotional time. It is the only way you can be sure that your wishes will be followed and that what you leave behind goes to the people and causes you care about. For people with dependents under 18, a Will should also specify who would be their guardian/s in their absence. Without a Will, your Estate will be dealt with under the rules of intestacy.

1. IT'S EASIER THAN YOU THINK

Writing a Will is much easier than many people think. Before making an appointment with a legal professional, you first need to have an approximate idea of the value of your Estate. To do this make a note of everything of value you own; property, car, personal possessions, pensions, investments, savings and any business you may own or part-own.

2. DIGITAL ASSETS

Most people now leave behind a digital footprint. It's important to think of all of your digital assets, such as online music collections or paid for apps, as well as social media accounts, and consider who you would pass them on to

in your Will. It is important to leave details of all online accounts you hold and their passwords e.g. Facebook, Instagram, Twitter, YouTube, iTunes, Spotify, Email, so that they can be accessed when you die and either closed on your behalf or account details updated to that of the new owner. Digital Asset logs can be downloaded from the internet to help you.

3. TYPE OF FUNERAL

It's important to include any other particular wishes you may have such as the type of funeral you would like, whether you have any pre-paid funeral plans in place and which cause or causes you would like funeral collections to be in aid of. If you decide to choose BTO to benefit from your in memory donations a simple line "I wish that donations in lieu of flowers at my funeral be given to the British Trust for Ornithology (Registered Charity No 216652 (England & Wales), SC039193 (Scotland) for its general charitable purposes absolutely." can be added to your Will.

4. CHOOSE YOUR EXECUTORS

Executors are responsible for ensuring that your wishes are carried out. You can opt for a professional such as a

solicitor or accountant, but you're free to appoint a partner, close friend or relative (they must be over the age of 18). However, if you would prefer to opt for someone other than your solicitor, it is advisable to ask the individual(s) first and explain what is required before naming them in the Will. It is also helpful to tell them where your Will is kept. Being an Executor can be quite an onerous task with a high level of responsibility.

5. DECIDE ON YOUR BENEFICIARIES

Naturally, you will want to provide for your loved ones first but you may wish to take this opportunity to leave a gift for the British Trust for Ornithology to support our vital research long into the future. A % share of your estate, after you have made provision for loved ones, is a particularly tidy way of doing so and prevents you from having to decide now on a precise sum. For Estates that will incur inheritance tax, leaving a total of 10% of your Estate to your chosen charity(ies) can ensure that gifts for non-exempt beneficiaries are charged at the reduced rate of inheritance tax payable (36% rather than 40%).

TYPES OF GIFT

There are a few different kinds of gift you can leave in your Will. The most common are described below:

- **RESIDUARY GIFT** A gift of the remainder of the estate after all other bequests have been made and debts cleared.
- **PECUNIARY GIFT** A gift of a fixed sum of money in your Will is called a pecuniary bequest. The value of pecuniary legacies will decrease over time, as the cost of living increases.
- **SPECIFIC GIFT** A named item, left as a gift in your Will, such as a piece of jewellery, a painting or a book collection.



Should you wish to remember BTO in your Will you might wish to take the following wording suggestions to your solicitor. They will ensure that your wishes are accurately followed.

Please also remember to use our full name, **British Trust for Ornithology**, and the correct registered address and charity numbers or your gift may not reach us.

RESIDUARY GIFT (A PROPORTION)

"I GIVE all (or a % share) of my Residuary Estate to the British Trust for Ornithology (Registered Charity No. 216652 (England & Wales), SC039193 (Scotland)) of The Nunnery, Thetford, Norfolk, IP24 2PU to be applied for its general purposes."



PECUNIARY GIFT (A SETSUM)

"I GIVE the sum of £__pounds to The British Trust for Ornithology (Registered Charity No. 216652 (England & Wales), SC039193 (Scotland)) of The Nunnery, Thetford, Norfolk, IP24 2PU."

SPECIFIC GIFT (AN ITEM OR ITEMS)

"I GIVE my natural history book collection to The British Trust for Ornithology (Registered Charity No. 216652 (England & Wales), SC039193 (Scotland)) of The Nunnery, Thetford, Norfolk, IP24 2PU. Any books unable to be utilised may be sold to raise funds."

...AND I DIRECT that:

"(a) the receipt of the person who professes to be the Treasurer or other proper office for the time being of the above mentioned charity shall be a complete discharge to my Executors

(b) if before my death the above mentioned charity has changed its name or amalgamated with or transferred all its assets to any other body then my Executors shall give effect to the gift as if it has been made to the body in its changed name or to the body which results from the amalgamation or to which the transfer has been made."

7. VALIDATE THE WILL

Your Will is only valid if two witnesses watch you sign it. They must also sign the Will. If not, it will not be valid and your Estate will be dealt with under the intestacy laws. Your witnesses do not have to read the contents of your Will before signing it. They must however be:

- over 18
- not be your beneficiaries
- not be your beneficiaries' spouses or civil partners

A beneficiary signing as a witness invalidates any gift you have left them in your Will.

If you have already made a Will, it is simple to make changes or additions by adding a Codicil.

UPDATING YOUR WILL

This means that you can leave a gift to The British Trust for Ornithology whilst ensuring that other provisions in your Will remain untouched. This avoids the cost of having your Will completely re-written. Your solicitor will help you add a codicil, but you might like to suggest the following form of words or use the example Codicil form at the back of this booklet.

“This is a Codicil of (your name) of (your address) to my Will date (today’s date).

I give (details of gift) to the British Trust for Ornithology (Registered Charity in England and Wales No.216652, and in Scotland No.SC039193), of The Nunnery, Thetford, Norfolk, IP24 2PU, for its general purposes and I direct that the receipt of the Treasurer or duly authorised officer shall be a valid and appropriate form of discharge. In all other respects,

I confirm my Will dated
(date of original Will).”

WILLS AND THE LAW

TAX ALLOWANCES AND INHERITANCE TAX

Inheritance tax (IHT) is a tax on money or possessions you leave behind and may be payable on your estate when you pass away. However, a certain amount can be passed on tax-free, which is called the 'tax-free allowance'. This is also known as the 'nil rate band' (NRB).

Everyone in the 2021/2022 tax year has a tax-free inheritance tax allowance of £325,000. The allowance is currently frozen until 2026.

If you own a property at the time of death, that you are living in or have lived in, and you are married or have direct descendants, you will be eligible for the Residence Nil Rate Band tax allowance (RNRB). This allowance currently stands at £175,000 per person for Estates up to £2 million pounds in value (frozen until 2026). If you have a mortgage on your property, the outstanding value of the mortgage will be taken off of the RNRB (e.g. if you have a RNRB of £175,000 and an outstanding mortgage of £150,000, only £25,000 of the RNRB would be available).

For a married couple with property, if the surviving spouse passes with both nil rate bands and residence nil rate bands intact (e.g. none of the NRB was used when the first spouse died), and they have direct descendants, the estate could have a tax-free allowance of £1 million pounds. Further explanation can be found on the Government website www.gov.uk

WHO CAN WRITE MY WILL?

We recommend that you use a registered solicitor or Will Writer to write your Will. The law on making Wills varies across the UK so to find a qualified solicitor in your area please visit The Law Society's website at www.lawsociety.org.uk

or the Institute of Professional Will Writers at www.ipw.org.uk or by phoning 0345 257 2570

BTO is part of the Remember a Charity consortium and they give lots of helpful information on writing a Will on their website. They also offer a discounted and a free Will writing service. To find out more visit www.rememberacharity.org.uk

TRUST US TO USE YOUR GIFT WISELY

Dawn Balmer, Head of Surveys, explains why BTO's surveys and the volunteers who take part in them are so vital.

I've been interested in birds from a young age and was fortunate to meet a local birdwatcher who introduced me to bird surveys where I grew up in Shropshire. Surveys tell us how species are faring; whether populations are increasing or declining, and how their ranges are changing. Some surveys help us understand why populations change, revealing the mechanisms driving these changes. Our surveys not only tell us about changes here in the UK, but they also feed into Europe-wide schemes.

Our long-term core surveys are vital to our work at BTO and are supported by funding from Gifts in Wills. We organise, in partnership with others, the BTO/JNCC/RSPB Breeding Bird Survey (since 1994) and the BTO/RSPB/JNCC Wetland Bird Survey (since 1947), and BTO's own Heronries Census (since 1928).

BTO has pioneered methodologies for the systematic collection of data on the abundance, distribution, habitat associations, movements,

survival, behaviour and breeding performance of birds over large geographical areas. This is achieved using networks of volunteers who continue to make a huge contribution to our understanding of the status and ecology of birds in the United Kingdom.

Volunteers are the backbone of BTO and absolutely vital to the success of our surveys, allowing us to produce robust data for analysis. As Head of Surveys, I appreciate the enormous effort that many volunteers make just to even reach their survey site – a long walk or cycle in, and sometimes even a night in a tent is needed! I also know that many sites aren't as pleasant as those I cover locally, and really thank the volunteers that walk the streets in our towns and cities.

Leaving a Gift in your Will to BTO ensures the future of our surveys and the vital role they play in enabling us to inform policy on key environmental issues such as climate change and biodiversity loss.



WHAT OUR LEGACY PLEDGERS SAY



"The future of our planet depends on us maintaining the natural world but it is vital that this is science-led and this is why we have included the BTO in our Will. If in some way our contribution helps then we will feel we have done a bit for the future." **Wendy Schmitt**

"I have included a gift to BTO in my Will because one of my strongest desires is for your work to continue on after my death. I am not wealthy enough to make a huge difference but if everyone gives just a little to a good organisation then a lot can be achieved." **Pat**

"I have been a BTO member and a ringer for over fifty years. It has been a huge part of my life. After providing for my family, I know that the Gift in my Will that I have left the Trust will continue to support its important work and, I hope, help encourage new, young and diverse members." **Peter Wilkinson**

CODICIL

Please sign this form in front of two witnesses. Your witnesses should not stand to benefit themselves or be married to anyone who stands to benefit from your Will or this Codicil and they must both sign the form when you do. Also, to be sure that it ties in properly with your Will, we recommend that you see your solicitor. Once complete this Codicil must be kept with your Will.

YOU FILL IN THIS SECTION

I (your full name)

of (your full address, including postcode)

.....

.....

declare this to be the (first, second or appropriate number)

Codicil to the Will I made on the (date in words)

1. I leave the sum of (amount in figures £ words) £

all the residue of my estate or a % share of the residue of my estate to The British Trust for Ornithology, of The Nunnery, Thetford, Norfolk, IP24 2PU, Registered Charity No. 216652 (England & Wales), SC039193 (Scotland), for its general charitable purposes absolutely.

2. I leave the following objects or articles (describe the objects)

.....

.....

(free of expense of delivery), to The British Trust for Ornithology of The Nunnery, Thetford, Norfolk, IP24 2PU, Registered Charity Number 216652 for its general charitable purposes absolutely.

3. I wish that donations, in lieu of flowers at my funeral, be given to The British Trust for Ornithology of The Nunnery, Thetford, Norfolk, IP24 2PU, Registered Charity No. 216652 (England & Wales), SC039193 (Scotland), for its general charitable purposes absolutely.

4. I confirm that the other aspects covered in my Will and other Codicil are correct.

SIGNED

DATE

YOUR WITNESSES SHOULD FILL IN THIS SECTION

We confirm that this Codicil was signed by the above named in our joined presence and then by us in his/hers.

First witness

Second witness

Address

Address

.....

Postcode

Postcode

Occupation

Occupation

**REMEMBER US IN
YOUR WILL**
Help our work live on...



British Trust for Ornithology

The Nunnery, Thetford, Norfolk IP24 2PU

Tel: +44 (0)1842 750050 Web: www.bto.org

Email: legacies@bto.org Twitter: @_BTO

Registered Charity No. 216652 (England & Wales), SC039193 (Scotland)