

Gift in Wills

Fusion's Legacy Charter



Our promises to you:

1. We understand that family and friends will come first. We are very grateful for any gift you may choose to leave Fusion after considering them.
2. We promise to be good stewards of any gift you choose to leave Fusion in your will. We will use your gift carefully and in a cost effective way.
3. Fusion seeks to be Biblical, Relational, Missional, Catalytic and Inclusive. We will demonstrate these values through the way we work with you to serve our beneficiaries, and in how we receive your legacy to us.
4. We will show your family and friend's compassion, integrity and honesty in all our legacy administration.
5. We will treat your data & all the information you provide about yourselves as you ask us to. We will keep this information in a secure location and not pass your details on to anyone else without your permission.
6. We understand that you may not wish to receive communications from us and will provide you with an opportunity to choose which communications you receive from us and how often. You can update these instructions at any time.
7. We respect your right to privacy. Although it would encourage us greatly to hear that you have chosen to leave us a gift in your will, we understand if you would rather keep this private.
8. We recognise that you have the absolute right to change your mind about any gift in your will to Fusion and will not interfere with any decision you make in the future.

Please send any payments to Fusion UK, 18 The Office Village, North Road, Loughborough, LE11 1QJ, marked for the attention of the Operations Manager.

If you have any other questions about legacies which have not been answered or you are an Executor for an estate that includes a legacy to Fusion and you would like advice and/or to make a payment, please contact Fusion on +44 (0)1509 268505 or by email: hello@fusion.uk.com.

Frequently Asked Questions

How do I make a Will?

We advise that you contact a local firm of solicitors who will, for a fee, help you to draw up your will.

Why should I write a Will?

A valid Will ensures that your estate is distributed according to your wishes. It enables you to provide for your family and loved ones as well as the causes that are close to your heart.

When should I write a Will?

In short ASAP. Many people think that they don't need to write a will until they are old, unwell, married, parents, homeowners or have a large amount of possessions. However, this couldn't be further from the truth. If you are in any of these categories and don't yet have a will then it is essential that you get one. But the truth is if you are of graduate age or older and have entered work your estate is probably worth far more than you realise. The sooner you write a will the more chance you have to look after the people and causes that matter to you and the more say you have over what becomes of your possessions and finances when

you can no longer benefit from them. Without a will, the State directs who inherits, so your friends, family and favourite charities may get nothing.

I would like to include a gift to Fusion in my Will. What information do I need to include?

Your solicitor can advise you on the correct wording. It's essential if you can include Fusion's registered charity number and address:

Fusion UK
18 The Office Village
North Road
Loughborough
LE11 1QJ
United Kingdom
Charity Number: 1073572.

What type of gift can I leave to Fusion in my Will?

Typically there are two types of legacy gifts:

1. *A share or percentage (residuary):* A share of the remaining estate after all other legacies have been paid. Any percentage can be left to charity, and this type of legacy enables you to ensure family and loved ones are provided for first of all as well as ensuring that the gift keeps pace with inflation.

We suggest the following wording for a residuary legacy:

I give _% of the residue of my estate to Fusion UK, Reg. Charity no: 1073572 of 18 The Office Village, North Road, Loughborough, LE11 1QJ, for its charitable purposes. I further direct that the receipt of the Honorary Treasurer or other proper officer of Fusion for the time being shall be a full and final sufficient discharge for the said legacy.

2. *A fixed amount of money (pecuniary) or a specific asset or item (specific):*

We suggest the following wording for a pecuniary or specific legacy:

I give to Fusion UK, Reg. Charity no: 1073572 of 18 The Office Village, North Road, Loughborough, LE11 1QJ the sum of £_/specific asset or item for its charitable purposes. I further direct that the receipt of the Honorary Treasurer or other proper officer of Fusion UK for the time being shall be a full and final sufficient discharge for the said legacy.

I already have a Will - how do I include Fusion?

If you already have a Will, you can simply add a codicil to your existing Will. It is best to check with your solicitor that the codicil is compatible with your existing Will.

Do I have to tell Fusion of my intentions?

We would love to know if you are planning to include a gift to Fusion in your Will, so that we can say thank you. We understand, however, that your Will is a private document and would not ask you to tell us the details of any gift you may decide to leave to Fusion. Knowing that we are named in someone's Will is helpful for us in terms of planning ahead, but you are under no obligation to tell us.

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