



Philanthropy
Services

Guide to leaving a legacy



Stewardship
Active generosity

Creating your legacy with Stewardship takes just three steps:

1 Choose how much you want to give

First, you will want to have a clear idea of how much you want to give away, and if you intend to give a proportion, fixed amount or residue of your estate. To get started, ask yourself two questions:

1. How much do you have? Roughly what is the total value of your estate?
2. How much will you give to charity? What amount or proportion of your estate do you want to give? You might also want to consider the following:
 - a) Who do you currently support?
 - b) Which organisations work in areas that are close to your heart?
 - c) Do you want to support your church beyond your lifetime?
 - d) Do you wish to give specific amounts to each cause, or distribute proportionally to a range of causes?

With this information to hand, you will be in a position to make some informed decisions about the amount you wish to give in your will.

2 Speak to your solicitor

The next step is to ask your solicitor to add a gift to Stewardship in your will. Put simply, this could cover all the charitable giving in your will, and, in making a gift to Stewardship (a UK registered charity), your estate may benefit from a reduced rate of Inheritance Tax.

The following text is an appropriate form of wording, which you could suggest to your solicitor or other person preparing your will:

'I give to Stewardship Services (UKET) Limited (also operating as Stewardship), of 1 Lamb's Passage, London EC1 Y 8AB (registered office), a registered charity number 234714 and a company registered in England and Wales number 90305, [insert amount of gift or proportion here]'.

Any Expression of Wishes should not be referred to in your will. Please see the 'Things you need to know' overleaf for further information.

3 Notify Stewardship

The final step is to let Stewardship know of your intentions, so we can make sure we have everything we need to honour your requests.

You can provide all this information by completing our Expression of Wishes form:

[Individual Expression of Wishes](#)

[Corporate Expression of Wishes](#)

You can choose who you would like to give to from your account or name a successor to continue giving after your lifetime. You can even entrust funds to Stewardship's own grants committee, allocated to our work in the areas of (1) mercy and justice, (2) evangelism and discipleship, or (3) generosity.

Want to change your requests?

In leaving a legacy to Stewardship, you can change your Expression of Wishes at any time without the need to involve your solicitor. You simply need to inform us as your wishes change.

Things you need to know

1. Getting the wording right

It is essential that the Expression of Wishes is not referred to in your will or, if it is, that it refers to a future document that you may provide to us. This provides you with the legal flexibility to make changes to your wishes at any time.

2. Amending your will

If you enter into a codicil (a legal instrument that supplements or amends your existing will) after you have sent us an Expression of Wishes, please seek further advice from your legal advisor to ensure that no unintended consequences arise.

3. Our fees

Please refer to the fees section on our website.

4. Supporting Christian workers

If you intend to support an Individual Partner (in full-time Christian ministry), please be aware of the following:

- a) We may not be able to carry out your request if it involves a single donation to an Individual Partner which is deemed too large. This is because such a donation may be regarded as a non-charitable application of Stewardship's charitable funds. We may, however, be able to make grants to the Individual Partner over an extended period of time. For further guidance on this matter, please contact us before completing your Expression of Wishes.
- b) Please be aware that if the status of your nominated Individual Partner has changed - for example, they are no longer in full-time Christian work - they may not be eligible to receive support from Stewardship.

Get started

If you already have an account with Stewardship, please complete an [Individual](#) or [Corporate](#) Expression of Wishes form. If you are new to Stewardship, please contact our team on the details below and we will guide you through the process of setting up the right account for you.

Further information

If you have any questions or need guidance, please contact our team:

T: +44(0)20 8418 8896

E: philanthropy@stewardship.org.uk

W: stewardship.org.uk