



Your Gift to the North East

Leave a gift in your Will
and help keep art, culture
& heritage at the heart of
our region.

TYNE & WEAR
**archives &
museums**
Development Trust



Giving a gift in your Will

Leave a lasting legacy or remember a loved one with a gift to Tyne & Wear Archives & Museums (TWAM).

Who are we?

Door to door we are 22 miles of innovation, art, history and science packed into four museums, three art galleries, two Roman forts and one archive. We hold collections of international importance in archives, art, science and technology, archaeology, military and social history, fashion and natural sciences. We are the story keepers of the North East.

Help us to protect and preserve the culture and heritage you care about by leaving us a gift in your Will.

We need your support

Many of Tyne & Wear Archives & Museums' most loved venues were founded on the passion and generosity of philanthropists.

We continue to rely on the kindness of our visitors and donors in order to sustain and develop our work. We are grateful to those we receive support from but, as public funding for regional museums decreases, leaving a gift in your Will is more important than ever before.



Sculpture of Alexander Laing by Christian Neuper (1876-1950)

The funds to build the Laing Art Gallery were provided by Alexander Laing, a Newcastle businessman who had made his money from his wine and spirit shop and beer bottling business.

When the gallery was founded in 1901 Alexander Laing didn't leave any paintings or other art to the gallery. He said that he was confident "...that by the liberality of the inhabitants [of Newcastle] it would soon be supplied with pictures and statuary for the encouragement and development of British Art".





Why give to TWAM?

We welcome people

We improve the lives of millions of visitors each year by helping people to understand the world around them. We are memory makers: we create experiences that provoke important conversations and we build curiosity in the minds of the future. We strive to remove barriers to art, culture and heritage by offering a sanctuary, a safe place to recharge, to reflect and to relax.

We celebrate places

Shaped by our natural, industrial and social landscape our collections are firmly rooted in our locality, yet nationally and internationally important. They reflect how the pioneering inventions of the North East have changed the world and how people from our region have impacted on

all aspects of life from science and industry to art and design. Through international partnerships we bring amazing artefacts from across the world to the people of Tyneside, helping all of us find our place in a shared history.

We care for collections & we share stories

We care for our region's heritage. We hold the memories of those who came before us and collect the stories for those who will come after. We conserve and protect internationally significant objects, artefacts and art. Your gift could help us to care for the precious works in our collection, bring showstopping exhibitions to the region and keep our region's stories accessible to all for generations to come.

Geoff Woodward, Museum Manager, North & South Tyneside:

"Leaving a gift to TWAM would help to protect and enhance important historical sites such as Segedunum Roman Fort and Arbeia, South Shields Roman Fort, which are part of the Frontiers of the Roman Empire World Heritage Site.

"Segedunum marks the start of Hadrian's Wall and is the most excavated fort along the Wall's length. Arbeia was the entry point into the frontier zone and has produced one of the finest collections of artefacts from any Roman fort. Both sites have stunning full-size reconstructed Roman buildings, which require careful care and maintenance. Your gift could ensure these sites endure for many years to come."

Caroline McDonald, Museum Manager, Great North Museum: Hancock:

"At the Great North Museum, we believe that inspiring access to culture and science improves the life chances of children and young people. Each year we welcome around 24,000 school children through our formal learning programmes and reach many more who visit with their families to enjoy our collections, exhibitions and events. Leaving us a gift in your Will would ensure that we can continue to walk hand in hand with children now, and in the future, as they discover the world around them and shape it into the world they want it to be."



Types of Gift

General Legacy

A gift in a Will that is not a gift of a particular asset, but is a gift of a cash sum to be paid from your estate.

These gifts can be index-linked to protect the value from the impact of inflation by adding particular wording. This is a very useful mechanism to ensure that the charity receives the full value intended. Your solicitor will be able to advise you on the wording required.

Specific Legacy

A gift of a particular asset(s) from your estate, such as a property, vehicle, or jewellery.

It is possible to include wording to deal with the possibility that you no longer own the asset you intend to give at the date you pass away. For example, in your Will you can state that you give any property you are using as your main residence at the date of your death, or a sum of cash if you no longer own a property at that date.

Residuary Estate

A gift of whatever is left over in your estate after payment of liabilities, general and specific gifts, tax, funeral and other expenses, or a share of whatever is left over.

It is important that these gifts are drafted carefully and in particular, that it is clear what is being gifted. In the example above, the term 'residuary estate' would need to be clearly defined elsewhere in the Will. Your solicitor will be able to advise you on this.

There can be Inheritance Tax advantages to leaving a portion of your estate to a charity. Charities are exempt from Inheritance Tax and in addition to this, the overall rate of Inheritance Tax on the rest of your estate is reduced from 40% to 36% when at least 10% of the net estate is left to charity. This means that in addition to making a valuable gift to charity, your estate is rewarded with a reduced Inheritance Tax bill.

Careful drafting is required to ensure that the criteria for the Inheritance Tax rate reduction are met and when including both individual beneficiaries and charities, it is essential that taxation issues are made clear in your Will. Again, your solicitor will be able to assist with these matters.

Trusts

It is possible to make a gift from your estate to a trust, of which one or more of the beneficiaries can be charities.

For example, Discretionary Trusts can offer flexibility and a range of other benefits, such as potentially protecting the value from being taken into account for means-tested benefits in relation to any of your beneficiaries and charities can be included as possible beneficiaries. Charitable Trusts can also be established to benefit charities.

If you would like to consider the use of trusts, it is essential that you seek professional advice from your solicitor.

Specific bequests & endowment

If you have a specific purpose in mind for your gift, or are thinking about leaving an asset, specific object or setting up a restricted endowment, we would encourage you to get in touch to discuss your idea first. For more information, please contact the Development Department, we would love to hear from you.

The logo for DWF, consisting of the lowercase letters 'dwf' in white on a red circular background.

Tyne & Wear Archives & Museums would like to thank DWF for its support as a legacy programme partner.

Giving in memory

A donation made in memory of a loved one is a very fitting way to celebrate their life and remember your happy memories of our museums and galleries.

Thank you

If you have already remembered Tyne & Wear Archives & Museums in your Will then thank you, we are very grateful for every gift we receive.

If you would like to speak to somebody about leaving a gift in your Will or making a donation in memory of a loved one you can get in touch by filling in the Pledge/Intention form and returning it to us or contacting Catherine Kirkham, Individual Giving Officer, catherine.kirkham@twmuseums.org.uk or **07870 393983**





FAQ

Why is a Will important?

A Will allows you to direct what will happen to your assets after you pass away and to divide your estate however you wish between as many people or charities as you choose. You are also able to decide who will have responsibility for ensuring your wishes are carried out, by appointing trusted people as executors.

What happens if I don't make a Will?

If you don't make a Will, the law will direct who may take control of dealing with your estate and who will benefit, in accordance with a strict set of rules known as the 'intestacy rules'. The intestacy rules direct that your estate will pass to individuals based only on their familial relationship to you, with a strict hierarchy of family members and no regard to your personal views or circumstances. Charities and individuals with no legal family relationship to you would have no chance of benefitting.

Making a Will can also reduce the risk of a claim being made against your estate.

Can I stipulate how my gift will be used?

Yes, you can. We welcome gifts that can be spent where the need is greatest, as that helps us to carry out the most urgent work. However, we are very happy to consider a gift for a particular one of our venues or collections. This means you can choose how you would like your money to be spent. However, there is more potential for complication when trying to enact the wishes for very specific gifts, although we will honour the wishes when possible. If you would like to discuss the terms of your gift, then please get in touch.

Should I tell you I am leaving a legacy to TWAM?

You don't need to tell us, but if you feel comfortable sharing your intentions then we would love the opportunity to thank you. If you are interested, we can send you information about how gifts are impacting our work and invite you to special events.

What is the impact for Inheritance Tax?

Charities are exempt from Inheritance Tax and if you leave at least 10% of your net estate to charity, this can result in a reduction of your overall Inheritance Tax bill, as the rate of Inheritance Tax payable is reduced from 40% to 36% if the conditions are met.





Pledge/Intention form

I want to keep art, culture and heritage at the heart of the North East.



A gift in your Will to Tyne & Wear Archives & Museums, whether large or small, will make a huge difference to our 4 museums, 3 art galleries, 2 Roman forts and 1 archive.

Please complete this form and return to: Catherine Kirkham, Individual Giving, Tyne & Wear Archives & Museums, Discovery Museum, Blandford House, Blandford Square, Newcastle Upon Tyne, NE1 4JA or email **cathe@twmuseums.org.uk**

You do not have to tell us if you have left a gift in your Will, and you are free to change your mind at any time. However, it would be helpful if you could let us know your intentions. This enables us to thank you for your support, and keep you up to date with the work of Tyne & Wear Archives & Museums.

Name

Address

Phone number

Email Address

- I am leaving a gift to Tyne & Wear Archives & Museums
- I am leaving a gift to (insert venue name).....
- I would like to be contacted to discuss leaving a gift in my Will

Contact me by (please tick all that apply):

- Post
- Email
- Phone

We will keep a record of this information until such a point that you inform us you no longer wish for us to store this information. You may also separately opt out of communications from us should you not wish for us to contact you with news or information related to your donation intentions.

My favourite part of Tyne & Wear Archives & Museums is.....

Thank you

Our Venues

Arbeia, South Shields Roman Fort,

Baring Street, South Shields, Tyne and Wear, NE33 2BB

Discovery Museum,

Blandford Square, Newcastle upon Tyne, NE1 4JA

Great North Museum: Hancock,

Barras Bridge, Newcastle upon Tyne, NE2 4PT

Hatton Gallery,

Kings Road, Newcastle University, Newcastle upon Tyne, NE1 7RU

Laing Art Gallery,

New Bridge Street, Newcastle upon Tyne, NE1 8AG

Segedunum Roman Fort,

Buddle Street, Wallsend, NE28 6HR

Shipley Art Gallery,

Prince Consort Road, Gateshead, NE8 4JB

South Shields Museum,

Ocean Road, South Shields, NE33 2JA

Stephenson Steam Railway,

Middle Engine Lane, North Shields, NE28 8DX

Tyne & Wear Archives,

Discovery Museum, Blandford Square, Newcastle upon Tyne, NE1 4JA

Thank you for your continued support.

twmuseums.org.uk

The logo for 'must-see museums' features a vertical bar on the left composed of horizontal stripes in red, yellow, blue, and green. To the right of this bar, the words 'must-see' are stacked above 'museums' in a bold, black, sans-serif font.

Would you like to stay up to date with what's on at our venues?

Join must-see museums today at mustseemuseums.org.uk

Must-see museums members receive a monthly e-newsletter with details of exhibitions, events and special offers based upon their interests.

The logo for the Tyne & Wear Archives & Museums Development Trust is a dark red square. Inside the square, the text 'TYNE & WEAR' is at the top in a small, white, sans-serif font. Below it, 'archives & museums' is written in a larger, white, sans-serif font, with 'archives' and 'museums' on separate lines. At the bottom, 'Development Trust' is written in a smaller, white, sans-serif font.

The Tyne & Wear Archives & Museums Development Trust is registered as a company limited by guarantee number 7334262 and is registered with the Charity Commission under charity number 1137867.