



hope

Leaving a legacy to Cumbria Community Foundation

George Kipling and the Kipling Funds

George Kipling lived and farmed at Burgh by Sands. He cared about his community and as he was a widower with no children, he decided to leave part of his estate to charity. In accordance with his wishes the Foundation has created two named funds. One benefits children and young people and the other the elderly throughout Cumbria. Groups benefiting from the Funds include:

- Drigg & Holmrook Family Group
- Nicholforest Public Hall
- Abbotsvale Community Centre, Barrow

Janet Wilson

Janet is now retired but worked for many years for the BBC. She has an interest in supporting people with disabilities. After discussions with her solicitor, Janet contacted the Foundation to discuss setting up a Fund through her Will. With support and expertise from Foundation staff she has written into her Will provision to set up a Fund to provide assistance for people with disabilities, probably in the form of bursaries. The bursaries will fund tuition fees, contribute towards living costs whilst recipients undertake training, and help buy equipment.

What does the Cumbria Community Foundation do?

We improve the quality of life for people experiencing disadvantage by:

Making grants to local charities

Promoting charitable giving by organisations and individuals

Managing grant making funds on behalf of individuals and organisations

Established in 1999, the Community Foundation has grant aided more than 2,000 groups, distributed £7m in grant aid, and built long term capital funds of £3m

"Cumbria Community Foundation makes all the difference in the world to people excluded from the normal benefits of community life."

James Cropper FCA, HM Lord-Lieutenant and the Foundation's President



CUMBRIA
COMMUNITY FOUNDATION
Giving for a better Cumbria

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Registered Charity No 1075120 June 2006



UKCharityAwards
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giving

Leaving Cumbria a better place



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Why make a legacy to Cumbria Community Foundation?

If you want to leave a legacy to a charity, sometimes it's difficult to decide which one.

Cumbria Community Foundation can provide a simple answer.

The Foundation was set up specifically to make grants to local charities on behalf of people with a love of Cumbria.

We act on your behalf to make sure that your gift stays local and is used for causes that matter to



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Leaving money to a charity creates a fitting memorial of your life and the causes that matter to you. Giving a legacy to the Community Foundation enables you to leave a gift that will benefit people for generations to come. Charitable legacies are exempt from inheritance tax



Why give through Cumbria Community Foundation?

We are a local organisation with deep roots in the community and a thorough understanding of local issues and needs.

We can increase the impact of your donation by pooling it with other gifts and grants.

We build long term capital funds that help benefit the community forever.

We have won national awards for our expertise in grant making.

We have responded quickly to emergencies raising nearly £3m during the Foot and Mouth and floods crises, and will do so again if required.

We are a community leader, bringing together other agencies to take special initiatives.

How does it work?

A good way to support the Community Foundation is to leave a legacy to our Cumbria Communities Fund. This money is invested and provides an ongoing income for grant making for the foreseeable future.

Alternatively with a minimum donation of £25,000 you may want to have a named fund. If your legacy establishes a named fund you can specify areas or causes to benefit from the money (see examples over).

Who benefits from the Foundation's grant making?

We give money to local voluntary and community groups. Our priorities are:

- Older adults
- People with disabilities
- Children and young people
- People with mental health needs
- People who are unemployed or on low incomes

What kind of will gifts can I make?

There are a number of ways to help the Foundation through your will:

- You can leave money, shares or property.
- You can give the net balance after other obligations have been met.
- You could arrange for your gift to come to the Foundation only after the lifetime of someone such as your spouse.

We recommend you seek advice from a solicitor if you are interested in leaving a legacy in your will.

Leaflet sponsored by:

CARTMELL SHEPHERD
—SOLICITORS—

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