



**BTO**

Looking out for birds

A gift in your Will provides a  
**legacy of knowledge**



# Inspire action for a wildlife-rich world...

**A gift in your Will to the BTO would fund the outstanding science that inspires action for a wildlife-rich world. This booklet is designed to give you more information about making or changing your Will and how to leave a gift to the British Trust for Ornithology.**

As government funding declines, we are becoming more and more reliant on the generosity of our supporters to maintain our vital research that informs the future conservation of our birds and the habitats on which they depend.

Gifts in Wills are so important to us, ensuring we can continue the research that makes a real difference for our birds. A gift in your Will would help us to continue to deliver the worldwide gold-standard of gathering impartial evidence from volunteers that affords us such a knowledgeable voice in nature conservation

If you do decide to remember us in your Will, you will be giving an invaluable gift; the protection of birds and their environment for future generations to enjoy.

**Dr Andy Clements**  
Chief Executive, BTO



# Evidence into action

**The BTO has been at the forefront of identifying key issues in UK bird conservation for over 80 years. Our long-term monitoring data on the status of UK birds sets the standard worldwide for understanding the effects of environmental change on wildlife.**

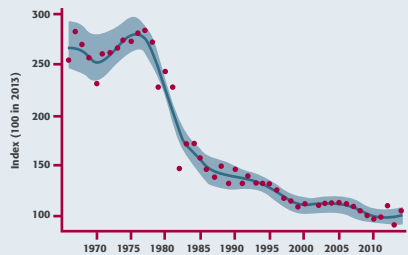
For example, it was the pattern of population change among farmland birds revealed by our Common Birds Census (CBC) in the late 1980s that first alerted conservationists to the existence of widespread declines in a range of farmland species. The Breeding Bird Survey (BBS) and our second Breeding Bird Atlas, published in 1993, highlighted that these declines had led to the disappearance of many once-familiar birds from large swathes of the UK.

Informed by this evidence, the UK government listed the reversal of farmland bird declines as a conservation priority.



## **CBC/BBS England 1966–2014, Skylark**

The introduction of Agri-Environment Schemes (AES), whose design has been shaped by BTO work, has seen the rate of Skylark decline slowed.



Agri-environment schemes, funded via the European Union's Common Agricultural Policy, were established as the principal policy and management mechanism aimed at delivering environmental benefits, work which continues to this day.

Our research has shown that many of our birds are in rapid decline and we face the very real risk of extinction from parts of the UK of some of our most iconic species in the coming decade. Monitoring bird populations and researching the causes of the underlying changes can provide real-world solutions which will protect birds and their environments for future generations to enjoy.

# Writing a Will

**Making your Will is vital, as 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. A Will is also helpful to your family and friends as a record of your wishes.**

1

## It's easier than you think

Writing a Will is much easier than many people think. You simply start by making a note of your possessions, from small personal items such as jewellery to larger assets including your home, savings and pension.

2

## 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).

3

## Decide on your beneficiaries

Naturally, you will want to provide for your loved ones first but you may wish to take this opportunity to do something lasting for the British Trust for Ornithology and further our cause into the future. A share of your estate, after you have made provision for family and friends, is a particularly tidy way of doing so and prevents you from having to decide now on a precise sum.





# 4

## Decide on the type of gift to leave

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 or a painting.

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*If you have, or have decided to include BTO in your Will, please let us know. It will ensure that we are aware of your wishes and can keep you informed of our work. Most importantly, it allows us to say thank you.*



# Including the BTO

**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.

## **Residuary gift (a proportion)**

"I GIVE all (or a % share) of my Residuary Estate to the British Trust for Ornithology (Registered Charity Number 216652) of The Nunnery, Thetford, Norfolk, IP24 2PU to be applied for its general purposes."

## **Pecuniary gift (a set sum)**

"I GIVE the sum of \_\_\_\_\_ pounds to The British Trust for Ornithology (Registered Charity Number 216652) of The Nunnery, Thetford, Norfolk, IP24 2PU.

...AND I DIRECT that:

**(a)** the receipt of the person who professes to be the treasurer or other proper officer 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.

## **Gifts in memory**

"I wish that donations in lieu of flowers at my funeral be given to the BTO."



# Updating a Will

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

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 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)."*



# Trust us to invest your gift wisely

**Gifts in Wills provide vital unrestricted funds that enable us to direct income quickly to where it is needed most, allowing us to invest in areas of research important in advancing our knowledge and understanding of birds and the habitats they depend on.**

Our Heronries Census is the longest continuous study of any bird species in the world. It counted its first Grey Heron nest way back in 1928; 400,000 nests later it has gone digital thanks to a gift in his Will from proud BTO member, Maxwell Hoggett.

The national census provides an annual estimate of the total UK breeding population of Grey Herons and reveals steep declines in the number of Herons breeding after severely cold winters. Winter can be a challenging time for grey herons as in freezing conditions, their favoured food supplies of fish and amphibians are locked beneath the ice and prolonged spells of cold weather can be fatal for these birds.

As top predators in the freshwater food chain, herons are able to thrive only when their potential prey are also present in good numbers. Monitoring their breeding population sizes can therefore also provide a valuable indicator of the health of the freshwater environment.



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***Unveiled in 2015 by his family, the Smeeton Scrape at the BTO Nunnery Lakes Reserve is an important habitat we have created thanks to the generous gift in Terry Smeeton's Will.***



# Wills and the Law

## **Inheritance Tax (IHT)**

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'.

Everyone in the 2015/2016 tax year has a tax-free inheritance tax allowance of £325,000. The allowance has remained the same since 2010-11, and will stay frozen until at least 2017.

## **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 depending on area or region so to find a qualified solicitor in your area please contact The Law Society at [www.lawsociety.org.uk](http://www.lawsociety.org.uk) or phone 020 7242 1222.

For Will Writers, contact the society of Will Writers at [www.willwriters.com](http://www.willwriters.com) or by phoning 01522 687888 or the Institute of Professional Will Writers at [www.ipw.org.uk](http://www.ipw.org.uk) or by phoning 0345 257 2570.

## **How much will it cost?**

You can usually expect to pay about £80–£100 for a single Will and £100–£150 for mirror Wills for a couple.



# BTO Achievements



**2007** Virtually 100% of bird ringing data is received electronically

**2008** BTO becomes a founder partner in the Cambridge Conservation Initiative

**2015** Membership tops 18,000, three times more than in 1973

**2002** The Migration Atlas: movements of the birds of Britain and Ireland published

**2000** BTO Scotland is established, with offices initially in Edinburgh

**1995** Garden Bird Watch is launched

**1993** The Wetland Bird Survey (WeBS) is established

**1961** BTO set up the Common Bird Census

**1973** The Register of Ornithological Sites commences

**1976** First Atlas of Breeding Birds in Britain & Ireland published

**1991** BTO moves headquarters to The Nunnery, Thetford, Norfolk

**1933** Max Nicholson founded the British Trust for Ornithology in Oxford

**1939** The Nest Record Scheme was born as the Hatching & Fledging Enquiry



# 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.**

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## 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 number 216652 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 number 216652 for its general charitable purposes absolutely.

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

**SIGNED** \_\_\_\_\_ **DATE** \_\_\_\_\_

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## 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.

1st Witness \_\_\_\_\_ 2nd Witness \_\_\_\_\_

Address \_\_\_\_\_ Address \_\_\_\_\_

Postcode \_\_\_\_\_ Postcode \_\_\_\_\_

Occupation \_\_\_\_\_ Occupation \_\_\_\_\_

Signature \_\_\_\_\_ Signature \_\_\_\_\_

## Would you like more information about including a gift in your Will to the BTO?

You can get in touch by:



Call us on **01842 750050** or



Email **legacies@bto.org**

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**www.bto.org**

British Trust for Ornithology, The Nunnery, Thetford, IP24 2PU, 01842 750050

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

Company Limited by Guarantee No. 357284 (England & Wales).

Patron HRH The Duke of Edinburgh KG KT

