



# Create a Legacy that Lasts

Leaving a  
gift in  
your Will

The   
Community  
Foundation  
Northern Ireland



## Welcome

At the Community Foundation for Northern Ireland, we are dedicated to empowering grassroots charities and community groups through strategic grant-making.



**RÓISÍN WOOD**  
Chief Executive Officer

With over 45 years of experience, we understand the unique challenges facing Northern Ireland and the vital role local individuals, families and businesses play in creating positive change.

By choosing to leave a gift in your will, you can transform people's lives.

You can strengthen communities, support innovative solutions, and uplift those who need it most.

Together, we can build a stronger, more resilient Northern Ireland—one where communities thrive and opportunities grow.

*Róisín Wood*

## About Us

The Community Foundation is a flexible and agile funder who listen and respond to the changing needs of our communities.

Setting up a fund through the Community Foundation is quick and easy for anyone wishing to support local communities and causes.

Whatever the reasons or motivations for giving, we will ensure that all funds are future proof, and suit the fund-holders wishes and circumstances.

Working closely with funders and donors, our connections across these islands, ensure that vital funding reaches those most in need as quickly as possible.

## Our Impact

The Community Foundation for Northern Ireland has awarded £120m over 45 years to groups and organisations across Northern Ireland.

Over the last five years more than £52 million has been awarded to over 4,000 projects.

With your help we can continue to make an impact in areas including education, health, housing, the arts, social justice, employment, peace and reconciliation, climate and equality, inclusion and diversity.

Together we can continue to empower local communities to affect positive change.

## Our Expertise

- Expert team to help shape your vision
- Donor care and guidance package
- Provide informed strategic giving solutions
- Build a long lasting trusted relationship
- Harness an extensive network of contacts







## Your Legacy, Your Way

Leaving a gift in your will to the Community Foundation for Northern Ireland gives you the freedom to shape your legacy, support the causes important to you and reflect your values.

You can direct your gift towards specific causes, communities, or geographic areas to create a powerful legacy supporting future generations and create positive change.

### Through a gift in your Will you can:

- say thank you
- remember someone or someplace special to you
- make sure local issues continue to receive support
- help people in your community who are less advantaged
- leave a legacy in your family name
- ensure several causes are supported
- give in an effective and tax-efficient way

Along with your solicitor or professional advisor, we can provide surety that your legacy gift will make the impact you want.

## Maximise Your Impact

Working with the Community Foundation for Northern Ireland means your giving is tailored to create the greatest possible impact.

Our deep knowledge of the sector and grant-making expertise allows us to guide you through the process, ensuring your gift is both meaningful and reaches the causes you care about most.

We work closely with you, your family, and even your executor to turn your generosity into lasting change.

## Make Your Gift Go Further with Match Funding

Through the Community Foundation for Northern Ireland's Legacy Match Fund, your gift can go even further. Your donation will be matched by 50% up to a maximum of £50,000 if match funding is available.

## Reduce Inheritance Tax

Gifts to charity are 100% exempt from inheritance tax. If you leave 10% of the net value of your estate in your Will to charity, the rate of inheritance tax will be reduced from 40% to 36% so more of your wealth goes where you want it to. Your accountant will be able to advise further.



At the  
Community  
Foundation  
your donation  
will be  
matched by  
50% up to a  
maximum of  
£50,000\*

\*The match fund is limited and will be distributed on a first come basis. We will match gifts in Wills which are known to us in advance and agreed.



## How can we help you

- Use our local knowledge and expertise to match deserving causes with the criteria set out by you in your Letter of Wishes.
- Offer a way to turn a single gift into one that keeps on giving in perpetuity, by investing your gift in an endowment.
- Enable family and friends to be involved in the process without the burden of legal or fiscal responsibility.

## Structuring Your Legacy

The first step when considering leaving a legacy is to decide the most suitable structure.

You can choose between the following types:

- A Residuary Gift: a percentage of your remaining estate after family, other gifts and fees have been taken care of.
- A Pecuniary Gift: a fixed sum of money.
- A Specific Gift: of assets or shares.

## Creating Your Legacy

Leaving a lasting legacy is simpler than you might think. To help you choose the best approach, we've outlined key steps you can take with your solicitor's guidance if you decide to leave a gift to the Community Foundation for Northern Ireland.

- Contact the Community Foundation for Northern Ireland for information.
- Meeting to establish your interest and understanding of the legacy match fund.
- Draft and agree a Letter of Wishes declaring your desire to leave a gift to the Community Foundation for Northern Ireland along with the details of which we can provide a template. This should be signed by the donor and solicitor and shared with the Community Foundation for Northern Ireland.
- When the time comes, we will establish your fund, distributing the money through the Foundation's standard decision-making process following the guidance provided within your Letter of Wishes.



## Getting in Touch

Leaving a gift in your will is a simple yet powerful way to ensure your kindness continues to shape the future.

If you'd like to learn more about how the Community Foundation for Northern Ireland can help you to create your legacy, please contact us at [giving@communityfoundationni.org](mailto:giving@communityfoundationni.org) or call us on **+44 (0) 28 9024 5927**



*"Having something really positive to focus on means mum's legacy continues. We know our mum would be so proud and happy to know she's still making her mark supporting others in our community."*

**Suzanne Lagan,**  
Kate Lagan Fund



# The Community Foundation Northern Ireland

Working hand in hand  
with communities to build  
a better future.

Charity Number: NIC105105

+44 (0) 28 9024 5927

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[www.communityfoundationni.org](http://www.communityfoundationni.org)



Diversity Mark



UK COMMUNITY  
FOUNDATIONS  
GIVING FOR LOCAL GOOD



MSC  
Marine Stewardship  
Council  
PEP-CERTIFIED

