

Legacy Policy

Policy Statement

We welcome all gifts in wills however large or small and we promise to use such gifts to make a difference to our parish. We will use gifts received in this way to help fund significant development projects, whether buildings, or equipment and the PCC will always make the final approval on behalf of the parish.

Since needs change over the years, we encourage donors to leave a gift in their will for the general purposes of the parish rather than for a restricted purpose. We will discuss possible uses of such gifts with your executors when the time comes, bearing in mind your known areas of interest in the church (e.g. a particular church in the parish, music, buildings, children and youth, overseas mission or aid) and the church's priorities at the time.

All gifts will be acknowledged but any donor wishing to remain anonymous will have that wish respected.

Who is this policy for ?

This policy will be made publicly available on our website and on any documentation that is produced to promote and inform the giving of a legacy to the parish.

Procedures

All information about legacies that are promised, or when receipt of the gift of a legacy arrives, should in the first instance be passed to the Planned Giving Officer who will ensure that:

- The donor or estate is thanked jointly by the Vicar and themselves
- The gift is banked (if required)
- The wishes of the donor are ascertained and clearly communicated to the Vicar, Treasurer and Churchwardens and in due course to the congregations (respecting any wishes for anonymity)
- Any issues of anonymity are identified and are clearly communicated to all parties

If individuals approach the church with a view to discussing the use of a potential legacy before it is made then such enquiries should be directed to the Planned Giving Officer who will draw on others as needed to enable the potential donor to make their planned legacy in terms that achieve their wishes and offer as much flexibility to the church as is possible.

Monitoring this policy

The Planned Giving Officer will be expected to produce for the PCC an annual report concerning the effectiveness of this policy and details of all legacies notified and/or received during the year

Approved by	PCC
Date approved	25 March 2025
Date of next review	March 2027