

The Wheelyboat Trust

The Wheelyboat Trust is a registered charity dedicated to providing mobility impaired people of all ages with independent access to waterborne activities (e.g. nature watching, pleasure boating, powerboating, angling) in wheelchair accessible Wheelyboats. We design, commission, fund and supply Wheelyboats and so far 165 have been placed all over the UK. As far as we know we are the only organisation doing this kind of work and given the thousands of miles and millions of acres of water across the UK, we have barely scratched the surface of the need for Wheelyboat provision and availability.

Whether it's for the scenery or wildlife, sport or recreation, education or rehabilitation, millions of people are drawn to open water in all its forms. Yet without the provision of accessible boats people with mobility impairments, whether they are wheelchair users or have difficulty getting around as a result of age, illness or infirmity, are mainly denied these life-affirming experiences. Wheelyboats overcome all the barriers: roll-on/roll-off access means they are simplicity itself to board; the level deck provides access throughout; and they can be driven by people with the severest of physical disabilities. Wheelyboats are an important factor in the quality of life their users are able to lead.



Rivertime II operates on the River Thames at Bisham Abbey

Legacies in action

Barney Wilson—lawyer, wheelchair user and Trustee of The Wheelyboat Trust. Barney's legacy was instrumental in helping the Trust develop a brand new Wheelyboat model. Launched in July 2014 on the Thames at Bisham Abbey (below), the V20 is designed for a wide range of activities on inshore and inland waters. Our most versatile Wheelyboat to date, the V20 enables disabled people to participate in more adventurous powerboating at speeds of up to 30mph. The V20 is an important development that significantly broadens the scope of powered boating for disabled people.



Christopher R Graves—keen angler and long term supporter of the Trust, his legacy had the specific aim of providing a new Wheelyboat to a fishery in Scotland. The Lake of Menteith benefitted and their Wheelyboat was launched in October 2013 (below).



How to leave a legacy

Leaving a legacy gift is very straightforward. If you already have a will a **codicil** is required to add The Wheelyboat Trust as a beneficiary. This is a simple form that the Trust can provide that needs witnessing by two people. Once completed, give it to your solicitor to attach to your current will.

If you have yet to write a will you can include The Wheelyboat Trust when you draw it up. Your solicitor will help with the specific wording and content of your will. Please make sure to use our registered charity number (**292216**) and registered office address (**20 Eversley Road, Bexhill on Sea, TN40 1HE**) when leaving a legacy to the Trust.

What type of gift?

Gifting a percentage of your estate, known as a **residuary gift**, will stay in proportion with the value of your estate, will guard against inflation and can grow over time. **Pecuniary gifts** are fixed sums of money stipulated when the will is drawn up or in a subsequent codicil.

What are the tax benefits?

If your estate is worth over £325,000 when you die Inheritance Tax may be due. If you leave at least 10% of your estate to charity the tax due may be paid at a reduced rate of 36% instead of 40%.

Any gifts you make to a qualifying charity (one recognised as a charity for tax purposes by HM Revenue & Customs), such as The Wheelyboat Trust, in your will or during your lifetime will be exempt from Inheritance Tax.

To avoid the need to continually revise charitable legacies in your will, a clause may be worded so that your legacy to The Wheelyboat Trust will always meet the 10% threshold. This means that even as the value of your estate fluctuates over time you can rest assured that the value of your gift will be worth at least 10% of your estate thus qualifying you for the reduced rate of Inheritance Tax.

Independent professional tax and legal advice should be sought when writing or amending your will.

Please let us know....

We'd love to keep in touch with you and would be very grateful if you would complete and return this form. The information provided will in no way be binding and will be treated in strict confidence.

Title ____ Initials ____ Surname _____

Address _____

Postcode _____

Email _____

Mobile tel _____

Daytime tel _____

My intentions:

- I have already included The Wheelyboat Trust in my will
- I intend to include The Wheelyboat Trust in my will

My gift:

- Is a pecuniary gift (fixed sum) of £ _____
- Is a residuary gift

I would like more information

- I would like to discuss this in more detail before I consider making any decisions. Please call me for a confidential chat.

Alternatively you may email us with a request for information to info@wheelyboats.org.

Please honour my wishes...

You can request your executors to ensure that instead of flowers at your funeral donations are made to The Wheelyboat Trust.

This leaflet, codicil and 'Please honour my wishes...' forms are available for download at www.wheelyboats.org.

Wheelyboats provide freedom and independence on the water for disabled people of all ages



Follow us

Patrons

President: His Grace The Duke of Roxburghe
Mr Jeremy Paxman Sir Max Hastings
Sir Matthew Pinsent CBE Mr Allan Lamb
Mr Charles Jardine Lord Steel of Aikwood KBE DL PC
Baroness Golding Mr Bernard Cribbins OBE

Trustees

Mr Anthony Duckworth-Chad OBE DL, Chairman
Mr Alistair Scott Mrs Tish Seligman
Mrs Elizabeth Macdonald-Buchanan
Mr John Fisher Miss Elizabeth Buchanan CVO
Mr Andrew Morgan The Lady Anthony Hamilton
Mrs Jane Wilson Mr George Seligman
The Countess of Lichfield

Director

Mr Andy Beadsley

The Wheelyboat Trust, North Lodge, Burton Park,
Petworth, West Sussex, GU28 0JT
T 01798 342222 E info@wheelyboats.org
www.wheelyboats.org Registered Charity No 292216



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A gift in your will

How to leave a legacy to The Wheelyboat Trust



"In their myriad forms, boats, boating and waterborne pursuits have an enormous attraction and play a key role in the lives of many. However, opportunities for disabled people to participate are few and far between. The Wheelyboat Trust aims to redress this balance and give disabled people the chance to pursue their favourite activities afloat. They provide a wonderful service and long may they continue."

Sir Matthew Pinsent CBE, Patron