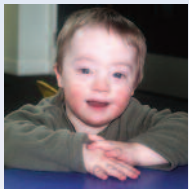


Giving something back

Have you considered updating your will to leave a gift that says thank you to your community or to help local people less fortunate than yourself? Or perhaps you have a real connection to a place, or you wish to safeguard support for a good cause that you care about?

Then setting up a **legacy-based endowment fund in your name** with County Durham Foundation could be the answer. Your gift will be **exempt from Inheritance Tax** and when received, your legacy will be invested and any interest and capital growth distributed in line with the Foundation's policy.

You choose the good cause



You choose the good cause that you wish your fund to support after your death - and **we do all the hard work**, taking care of the bureaucracy and red tape, ensuring that your support achieves the maximum benefit for future generations. We

can even use our **knowledge and local expertise** to identify the right good causes for you to consider if you are unsure. Even better, there are **no lengthy legal expenses** to set up or administer your fund either now or in the future. Whether you are interested in the **arts, environment, health, community, education, your church, sport or any other local good cause** - leaving a legacy to County Durham Foundation gives you access to professional expertise and experience, backed up by unrivalled knowledge of local need. So your legacy will be in safe hands for generations to come and we will guarantee that it will be spent locally, and only in accordance with your wishes.

We provide investment expertise



County Durham Foundation's investments have **consistently out-performed the market**. Overseen by a team of **skilled experts**, our performance has allowed us over the last ten years to increase our invested

funds by more than the rate of inflation whilst generating over £3million to give out as grants. Our aim will always be to maintain and increase the value of your capital sum invested, and generate sustainable levels of income to support your chosen area.

The **minimum amount** you need to leave for an endowment fund is **£25,000**, but if you cannot afford this much, you can achieve so much with **smaller amounts that will go direct to your chosen good cause**.

Your gift will meet local needs for many years to come

Leaving a legacy to County Durham Foundation means **you don't have to choose which individual charity will benefit from your gift** - as many can continue to receive support year after year, adapting the recipients to meet local needs under the guidance of our professional expertise. Or you can choose to leave a legacy to support one of our existing funds.



Who are County Durham Foundation?

County Durham Foundation was set up in 1996 to provide a service for people who want to help their local community. It is one of the leading community foundations in the country and we support good causes by distributing grants in peoples' name.

We are a registered local charity with a Board of Trustees comprising people from different walks of life who understand local issues. They are advised by a small staff team who have been nationally recognised for their professionalism and expertise.

Our grant making has touched the lives of over 80% of the population of County Durham and Darlington. We also support good causes across the North East, the rest of the UK and internationally.

We recommend that you discuss your legacy requirements with your professional advisor and will be happy to provide any information you require to support your choice.



INVESTOR IN PEOPLE



quality accredited by
Community Foundation Network
to standards endorsed by the Charity Commission

Your own fund, in your name, in our care



Graeme Wood

John Simpson Greenwell Fund

Graeme received a legacy from his uncle and decided to use his windfall to set up a fund in his uncle's name to support educational bursaries for students at College of St Hild & St Bede, Durham University. His bequest was exempt from inheritance tax even though the charitable bequest was not included in his uncle's original will.

“At all times County Durham Foundation have been professional, approachable and above all friends, who have made easy what would otherwise have been a very daunting task for me and all my family”



David and Barbara Watson

Having no children, Barbara and David decided to leave the bulk of their estate to County Durham Foundation, to help young musicians and artists achieve their potential.

“We are interested in drama, music and theatre and setting up a named endowment fund means that we can help young people access opportunities they couldn't afford. Maybe our fund will inspire a future Lawrence Olivier, Pavarotti or Billy Elliot”

What will your legacy pay for?

Individual legacies:

- £1,000 legacy will buy a football kit for a village team
- £5,000 will pay for an adventure break for 25 disadvantaged children
- £10,000 will pay for a new kitchen and accessible toilet for a village hall
- £20,000 will pay for a new children's playground

Named endowment fund legacies could fund the following activities, each year and for ever:

- £25,000 will pay for a months' feed for an animal shelter
- £50,000 will pay for training and education support in a specific area at your local hospital
- £100,000 will pay for 20 bursaries to support talented young musicians or artists
- £250,000 will support all the running costs of a local community organisation

In ten years, a £25,000 fund could generate at least £12,500 to support your chosen good cause, whilst increasing the capital value by the rate of inflation.

For more information about legacies guaranteed to support your local good cause, please contact County Durham Foundation on 0191 383 0055 or email info@countydurhamfoundation.co.uk



County Durham Foundation

Community Foundation serving County Durham and Darlington

Jordan House, Forster Business Centre,
Finchale Road, Durham DH1 5HL

Tel: 0191 383 0055 Fax: 0191 383 2969

Email: info@countydurhamfoundation.co.uk

www.countydurhamfoundation.co.uk

Registered charity no. 1047625 Limited company no. 3072153

My people my community my place



**Legacies guaranteed to
support your local good cause**



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