

# Create your legacy of kindness

**#GiveHope** for them today and for the  
generations to come

## Everyone should make a Will

A Will gives you the **power to choose** how your assets are used. They're not just for the wealthy – everyone should have one. They don't need to be expensive or complicated, but legal advice will ensure your Will is clear and effective.

## It is crucial to have a Will because:

**If you die without making a will...** your assets will be distributed according to strict intestacy rules, which set out which members of your family will inherit. This means that the people who inherit might not be the people you would choose to bequeath your estate to.

**If you have a partner...** but are not married or in a civil partnership, he or she will not inherit your estate if you do not have a valid will.

**In a will you can appoint guardians...** to look after any children that you have who are under the age of 18. If you do not appoint guardians in your will, you will have no control over who looks after your children in the event of your death.

**If you have children from a previous relationship...** you might like to ensure that they inherit your assets but also ensure that your current partner/spouse is protected and can remain living in your home. The only way to ensure that this happens is to make a will.

**ROLDA UK** -- Charitable Incorporated Organization (CIO) Registered in England and Wales.  
Charity No. **1162690** Registered  
Address: ROLDA, Suite 9273, PO Box 4336, Manchester, M61 0BW UK  
Email: [gemma@rolda.org.uk](mailto:gemma@rolda.org.uk), Website: <https://uk.rolda.org>, Phone: +44(0)1615317797



# What to consider when writing your will

We've put together the six most important steps you need to think about when writing or changing your will:

## 1. What do you have to leave?

Work out the value of your estate and any liabilities you may have to give a good idea of your assets.

## 2. Decide who you want to benefit

Make a list of the people and organisations you want to remember in your will, and how you'd like to divide your assets amongst them

## 3. Choose the executors and/or guardians

You can choose up to four executors – these are the people that will make sure your wishes are carried out. If you have children under 18 you should also consider appointing one or more guardians who will have parental responsibility for your children following your death. You do not need to appoint the same people to perform both these roles, since they require different skills. The people you appoint as executors and guardians can decline to act if they wish. It is therefore important that you appoint people who will be happy to act and, if possible, discuss matters with them before appointing them. You should also consider the possibility of appointing a substitute executor or guardian who could act in the event that your first-named executor or guardian is unwilling or unable to act.

## 4. Use a Solicitor or will-maker

If you don't already have one, just contact: The Law Society 020 7242 1222 or [www.lawsociety.org.uk](http://www.lawsociety.org.uk) to find a local Solicitor.

Alternatively, you can contact: The Institute of Professional Willwriters 0345 257 2570 or [www.ipw.org.uk](http://www.ipw.org.uk)

You can find ROLDA UK on **Remember a charity** website at:

<https://www.rememberacharity.org.uk/charities/rolda-uk/>

## 5. Keep it safe

Your solicitor or bank can help you with this. Remember to keep a copy for yourself and let your executors know where to find it

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## 6. Keep it up to date

Your will is an important document and should be regularly reviewed to make sure that you are still happy with its contents. Changes in your personal or financial circumstances might mean that changes need to be made in your will.

### What if I have already made a will?

If you want to leave ROLDA UK a gift in your will, all you have to do is add a codicil. This should be kept in a safe place together with your will. Talk to your solicitor who can help you draw up this additional document which allows you to give to a charity without having to update your will.

## Your legacy of Kindness

It's hard to say what it is about pets that leave such a lasting mark on us. Perhaps it's their remarkable ability to love unconditionally, to forgive to live life fully in the moment. Or perhaps it's simply the way they prance about on walks or stealthily take over your bed at night.

Whatever it is, your pets have left a unique imprint on your heart, helping to shape what matters to you most today. That may mean wanting to reach out and help the many homeless pets waiting to experience the same joy you share with your pets.

Your love of all animals, forged by those deep bonds, has already helped create a better life for many homeless pets. By making a gift to ROLDA through your *will*, *trust* or another *legacy plan*, you can create an **enduring gift** to **#GiveHope** to all the animals in need in the future.

## Tax Benefits

As a **general rule**:

- Gifts to registered charities are **wholly exempt from Inheritance Tax**
- If you leave all of your estate to ROLDA UK, **no Inheritance Tax will be paid** from your estate at all
- If you choose to leave part of your estate to relatives and friends, you can reduce the Inheritance Tax payable by also making a bequest to a registered charity

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If you choose to leave 10% or more of your estate to a charity like ROLDA UK, your estate will benefit from a cut in the actual rate of Inheritance Tax payable. Specifically, anyone leaving 10% or more of their estate to charity will have their inheritance tax rate reduced from 40% to 36% from April 2012.

This really is great news for charities and a move which we hope will boost significantly the number of people who leave a lasting legacy to causes like ROLDA UK.

## What about Inheritance Tax (IHT)?

Any money or assets left in your estate may be subject to Inheritance Tax. Any gift you make to a charity will be deducted from the total value of your estate before IHT is applied, so by leaving a gift to ROLDA UK you could help reduce the need to pay tax on your estate after your death.

Where a deceased's estate exceeds the Nil-Rate Band (currently £325k), IHT is generally payable at 40%; where a gift is left to a **'qualifying'** charity there are two potential benefits:

- IHT is not payable on the gifted amount; and
- Where 10% of the estate is left to charity, IHT may be reduced to 36% across the whole estate.

A **qualifying charity** in simple terms is a registered charity in the UK, the EU, and some other countries (including Norway and Iceland) – this should be confirmed when leaving a charitable legacy where the intention is for the estate to benefit from the tax advantage. The UK's potential departure from the EU will not affect the above, as the exemption for EU registered charities is written into UK law.

IHT is complex, and married couples and civil partners have a higher threshold, so it is worth asking your solicitor to advise you on your position.

Read more about IHT here: [www.hmrc.gov.uk/inheritancetax](http://www.hmrc.gov.uk/inheritancetax)

## How to Begin

It's a simple process to leave a donation in your Will to ROLDA UK:

1. Leave a set percentage of the net value of your estate to ROLDA UK – this will protect your other beneficiaries' inheritances if your estate is reduced between now and when you die.
2. Don't specify which charity you want to leave money to in your Will – specify it in a Letter of Wishes instead as this will provide more control.
3. Consider how a charitable legacy might affect your tax position – leaving a little more than you plan could reduce the rate of Inheritance Tax you pay.

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4. Ensure you talk your decision through with your family – this will avoid disputes and legal wrangling after you're gone.
5. Pick your Executors carefully – this will help to ensure your wishes, including the charitable legacy, are carried out in the way you intended.
6. Seek legal advice from an expert if you are planning to update your Will – the easiest way to do this is using a Codicil.
7. Review your Will regularly and update when necessary – changes to personal circumstances, fluctuations in the size of your Estate are all reasons to review your Will.

Choose the type of legacy you would like to leave to ROLDA UK:

- A **pecuniary** or monetary legacy allows you to leave a specific sum of money to ROLDA UK. It is possible to link this sum to inflation so that the gift does not depreciate over the years. Please consult your legal advisor.
- A **residuary legacy** allows you to leave all or part of the remainder of your estate to ROLDA UK, after other legacies and charges have been met.
- A **reversionary legacy** leaves your assets to a named beneficiary (for example, your spouse or other dependant) for their lifetime, with the whole or a portion reverting to ROLDA UK on their death.
- A **specific or non-monetary legacy** allows you to leave a specific possession (for example, shares, property, stocks, pictures or furniture) to ROLDA UK to be retained or sold to provide funds for our work.
- A **conditional legacy** provides for the eventuality that if none of your dependents survives you, your estate will be left to other named beneficiaries including, perhaps, ROLDA UK.

## The advantages to mention ROLDA in your will

You **don't** have to be **rich** or **famous** to make a difference. You just **have to make a simple decision**. Whoever you are, whatever your situation is, you can help **create a better world** for animals in need by including ROLDA UK in your will.

These are some of the advantages to mention ROLDA UK in your will.

- You can make a gift that costs you nothing
- You can have some tax benefits

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- You can change your beneficiaries at any time
- You can provide for your loved ones but also for causes that you care about
- Large or small, your donation will ensure that your values live on!

ROLDA pledges to put your gift to the best possible use to **protect the animals in need**.

## Sample Wording

The suggested form of wording for a **specific legacy** is:

"I give and bequeath unto the ROLDA UK (a charity registered with the Charity Commission for England & Wales no. 1162690) my [... description ...] to be applied for its general charitable purposes and I declare that the receipt of the Chief Executive or other proper officer for the time being of ROLDAUK shall be sufficient discharge to my Trustees."

The suggested form of wording for a **pecuniary legacy** is:

"I give and bequeath unto the ROLDA UK (a charity registered with the Charity Commission for England & Wales no. 1162690) the sum of £..... to be applied for its general charitable purposes and I declare that the receipt of the Chief Executive or other proper officer for the time being of ROLDA UK shall be sufficient discharge to my Trustees."

A **residuary bequest** is generally of the greatest benefit to our charity as its value increases in line with inflation.

If you wish to leave **all the residue of your estate** to our charity, the suggested form of wording is:

"Subject to the payment of my funeral and testamentary expenses I give devise and bequeath the residue of my real and personal property of whatsoever nature and wheresoever situate of or to which I shall be entitled at the date of my death to my Trustees upon trust for ROLDA UK (a charity registered with the Charity Commission for England & Wales no. 1162690) absolutely to be applied for its general charitable purposes and I direct that the receipt of the Chief Executive or other proper officer for the time being of ROLDA UK shall be sufficient discharge to my Trustees."

If you wish to leave a share of the residue of your estate to our charity, your solicitor will explain how the bequest should be worded.

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# Types of gifts

## A) Paying a set **sum of money** to ROLDA UK

If a set sum of money has been left to ROLDA UK the process for transferring these funds is as follows:

1. Get in touch with ROLDA Legacy team by email [legacy@rolda.org](mailto:legacy@rolda.org) and write a brief letter with your details, those of the deceased, and a description of the gift (ideally a copy of the part of the Will with the gift to ROLDA UK).

2. Pay a **gift** in using the following **bank details**:

Name: ROLDA UK

Bank account: 23689565

Sort code 20-09-72

Bank name: Barclays Bank

3. Alternatively, you can pay **by cheque**.

Please make it payable to:

ROLDA UK  
Suite 9273  
PO Box 4336  
Manchester  
M61 0BW

## B) Gifts that leave a **percentage of an estate** to ROLDA UK

If a percentage or the remainder of the estate has been left to ROLDA UK then the steps for processing this gift can be more complex. But don't worry – we're here to help.

As soon as you are able please help us by sending:

- A copy of the Will
- A schedule of assets and liabilities (or the estate Inventory and form C1 if the deceased lived in Scotland)

Once we know what is involved in the estate we'll be able to provide you with additional information to help you oversee the administration process.

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### C) **Gifts** dependent on other events

If ROLDA UK is left a gift which is subject to someone else having an interest first, i.e. a right to live at a property for life (usually called a life interest) we will need to see:

- A copy of the Will
- A schedule of assets and liabilities (or the estate Inventory and form C1 if the deceased lived in Scotland)

From time to time, we will need to make sure that our information is up-to-date. Please contact us as early as possible so we can agree contact on an ongoing basis. As with other types of gifts, once the estate is settled we will require a copy of the Estate Account.

Where the Trust Asset is **property**, please let us know the insurance and maintenance details of the property each year.

Where the assets are **stocks and shares** please send us a portfolio valuation each year.

### D) **Other types of gift**

Sometimes people leave us gifts where the value is not set. To make sure that the person's wishes are honored as closely as possible we like to make sure we are involved in the sale or use of these types of gift – so please contact us as soon as you can.

### E) **Property or land**

If the gift includes property or land, please help us make the most of the person's legacy by sending two or more valuations before it is sold. You can get these from an independent estate agent or surveyor.

In some situations we will need a professional surveyors' report under charity law (England and Wales only) which is a more detailed valuation of the property. If the property or land is in Scotland, please help us by showing us the Home Report and a marketing appraisal.

As a charity we do not pay capital gains tax, which may arise if the property has increased in value since the person died. If steps are taken we can avoid any tax liability and really make the most of the gifts left to us.

### F) **Investments and shares**

We can often obtain preferential rates – both for the charity and for co-beneficiaries – in the sale of stocks and shares, so please contact us before selling any shares.

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# ROLDA Legacies Society

The **ROLDA Legacies Society** recognizes those who have chosen to turn their love for animals into a generous offering through their will, insurance policy or other legacy gift that provides a future of kindness to animals.

All you need to do to join the ROLDA Legacies Society is share with us that you have made a gift to ROLDA, Inc in your will, trust or other legacy plan. Membership is voluntary and without obligation. Please let us know so we can celebrate your commitment and legacy of kindness.

## FREQUENTLY ASKED QUESTIONS

- Are there benefits to being in the ROLDA Legacies Society?

The biggest benefit, of course, is that you'll be helping animals in need for generations to come. But you'll also receive newsletters and updates from us, and Legacies Society's friends get a 10 percent discount on ROLDA online store, along with free shipping.

- I already put ROLDA in my will. Do I need to do anything else?

Yes, please **complete the Confidential Legacy Pledge Form** so that we can have a written record of your generosity. It's a non-binding agreement strictly for our records and ensures that you will become a member of the ROLDA Legacies Society.

**What is ROLDA correct and legal name?** ROLDA UK

**What is ROLDA's address?**

ROLDA UK  
Suite 9273  
PO Box 4336  
Manchester  
M61 0BW

**What is ROLDA Reg. No.?** 1162690

**How do I get in touch with ROLDA team in UK?** You can reach our team by calling us at 01615317797 or emailing [legacy@rolda.org](mailto:legacy@rolda.org)

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# Your legacy in action

The legacy you create now will help ensure that the difference you've made for so many homeless pets today can continue on for the homeless pets of tomorrow.

That's especially true if you choose to designate your gift for **general use**.

Doing so means that over 1000 animals that rely on ROLDA for care or emergency aid (food, medicines) on any given day will **feel your generosity**. So will the hundreds of community pets saved from death in ROLDA private shelters every year, or through social programs (including sterilization, microchip), and the grateful families helped. And so many more will benefit from your gift as well.

You can choose to designate your gift for **specific use**. ROLDA relies on the public generosity to be able to continue its work, all the donations currently received go to rescue injured, neglected dogs, paying for their medical bills, food and sheltering and also helping the pets from the poor communities. Since ROLDA exists, the capital projects (building the shelters, buying rescue van and equipments, major repairs) were made with major donor gifts and legacies. When you donate for a building (capital) project, you can name it in memory of someone's or to honor a dear friend or family member.

ROLDA's **medium term projects** include:

- Building the first sanctuary for disabled and senior cats (missing eye, missing leg, etc)
- Equip an onsite veterinary clinic (we already have the building and it is connected to utilities (electricity, water))

ROLDA's **long term projects** are very ambitious:

Buying additional land to build the **PawzUp Center** which will include:

1. a **sanctuary for donkeys** and
2. a **sanctuary for horses**, all rescued after being abandoned by their owners, when they are incapable of work - and often ending up sacrificed for the illegal meat industry. The sanctuaries for donkeys and horses will have indoor and outdoor areas. The architect plans have already been drawn up.
3. a **modern adoption center for dogs and cats**
4. a **therapy area** where children with special needs, or seniors from the local retirement homes, can visit to interact with the animals: walking the dogs, petting the dogs etc. Promoting such interactions

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and highlighting the benefit to people lives will increase the awareness of the whole community regarding animal welfare issues.

5. a **large outdoor area** where people can spend time with the dogs and cats in our care

6. a fully **equipped clinic for large animals**

7. a **space for the recovery and rehabilitation** of small animals

8. an onsite vet clinic so we are able to treat dogs onsite, rather than transport very ill or injured dogs to the local clinic. For special analysis, or difficult treatments, we need to transport them to Bucharest, which is a 6 hour round trip. Many dogs don't make the journey.

The whole Pawzup project is estimated to be 2.5 million EUR and because of its huge cost, it will need to be tackled in stages. We see the Pawzup clinic acting as a model for other charities in Romania, and we are more than happy to share best practice.

**Where we see ROLDA 10 years from now on?** Considering that strays 'population is decreasing, assuming that improvised shelters will slowly disappear, in 10 years from now, Romania will need spotless animal facilities and with a source of funding like legacies, ROLDA can use the vast expertise accumulated and put at work our knowledge to serve the local community.

Our valuable assets include: **shelter design and management, diseases control strategy, experienced team** with knowledge about dogs behavior and about caring for large animals.

Regardless of what gift option you choose to help animals in need, your donation can be used for whatever purpose you choose. This is your gift to the future, and we have the highest respect for your wishes. To ensure that we can comply with your wishes, please contact ROLDA team at 01615317797 or [legacy@rolda.org](mailto:legacy@rolda.org) before executing legal documents containing a specific use for your gift.

Thank you for your extraordinary commitment to the animals. Thank you, too, for your kind and generous heart and spirit.

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## The Legacy Wall

Every generous gift to homeless pets through ROLDA does more than fill a food bowl, provide warm bedding, bandage a leg or find a forever home. It helps to **shift our society** toward one that will **not accept the ongoing killing** and will **react against the abuses** committed toward voiceless, defend less animals. Your kindness today will help, save and give hope now and into the future.

In honor of such enduring commitments, ROLDA recognizes planned gifts received on the legacy memorial wall located near our shelter building.

ROLDA operates in one of the poorest regions of Romania, located in south east of the country. On any given day, about 700 dogs, a few cats and a donkey enjoy the comfort of ROLDA sanctuaries as their home, for many the only home they ever had.

For more than 15 years, homeless pets — many with special needs — who have run out of time and options have come here for love, healing and another chance to find a forever home. The work at the ROLDA sanctuaries allowed the message of kindness toward homeless pets to take root in local communities.

Even though caring people like you have helped us to make tremendous progress, more than 18,000 dogs wander on the streets, waiting to be catch and killed in filthy public shelters simply because they don't have safe places to call home.

ROLDA efforts are concentrated to help responsibly, efficiently and humanely the strays and abused animals in Romania.

Note: ROLDA UK does not provide legal, tax or financial advice. The information provided in this booklet is general in nature and is presented solely as educational information to illustrate charitable giving options and arrangements. You are encouraged to consult your own professional advisors to make certain a specific gift under consideration is compatible with your financial and charitable goals.

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# Confidential Legacy Pledge Form

We understand that how you plan to allocate your wealth is a private matter. However, if you wish, you can use this form to let us know of your intention to leave a legacy to **the most neglected homeless animals from Europe**, through ROLDA. The information you provide in this form is for our knowledge only and is in no way a binding commitment on your part. It informs us of your current intention and allows us to respond appropriately. Please be assured that your reply will be treated with the utmost confidentiality.

During our [Legacy Challenge](#), a matching donation with the equivalent of 5000 US\$ will be released in [your name](#) by a group of generous Swiss board advisors to **immediately help suffering animals!**

Full Name \_\_\_\_\_

\_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Town \_\_\_\_\_

Post code \_\_\_\_\_

Country \_\_\_\_\_

Email address \_\_\_\_\_

Daytime Tel \_\_\_\_\_

Evening Tel \_\_\_\_\_

Solicitor/Executor's Name and Contact Details

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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**Please complete either A or B and select one of the following options:**

A. I have already included ROLDA UK in my will with:

- A residuary legacy
- A proportion of remainder of my estate
- A pecuniary legacy (fixed sum of money)   
please indicate the amount in £ \_\_\_\_\_
- A legacy in kind (a specific item)
- Other   
Please give details:

\_\_\_\_\_

B. I intend to remember ROLDA UK in my will with:

- The residue of my estate
- A proportion of remainder of my estate
- A pecuniary legacy (fixed sum of money)   
please indicate the amount in £ \_\_\_\_\_
- Other
- Please give details:

\_\_\_\_\_

Please use this space if you would like to tell us anything about yourself, your gift, and the reason you have chosen to support ROLDA UK's work in this way.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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