

Amending your Will by Codicil

If you already have a Will you can always make a Codicil to include a new bequest to TV&GWOT which should be witnessed by two people.

Example Codicil wording

I..... (your name) of (address) declare this to be a first/second/.....# Codicil to my Will dated..... (# insert appropriate number)

In addition to any legacies given by my said Will, I give free of tax to the Thames Valley & Great Western Omnibus Trust (Registered Charity No. 1125980) whose registered office is at Ledger Farm, Forest Green Road, Fifield, Maidenhead SL6 2NR, **the sum of £**..... (in figures and words) to be used for its general charitable purposes. I declare that the receipt of the Treasurer or other proper officer of the said Trust shall be full and sufficient discharge to my Executors.

In all other respect I confirm my said Will and any other Codicils thereto.

In witness whereof I have hereunto set my hand this day of (month) (year).

Signed by the said.....(your signature) as a codicil to his/her last Will in the presence of us who at his/her request in his/her presence and in the presence of each other have hereunto subscribed our names as witnesses

Witness signature	Witness signature
Name	Name
Address	Address



If you have queries on any aspect of legacies or bequests for the benefit of TV&GWOT, please do not hesitate to contact the Trustees for a confidential discussion without commitment.

THE THAMES VALLEY & GREAT WESTERN OMNIBUS TRUST, LEDGER FARM, FOREST GREEN RD, FIFIELD, MAIDENHEAD SL6 2NR
REGISTERED CHARITY NO. 1125980 Email: enquiries@tvagwot.org.uk

THAMES VALLEY & GREAT WESTERN
Omnibus Trust

A LEGACY GUIDE

Help preserve the Thames Valley & Great Western public transport heritage for future generations



THE TRUST VISION

To preserve and treasure our Thames Valley & Great Western bus heritage
connecting people places and the past,
bringing joy and understanding of where we have been
and where we are going today

The Thames Valley & Great Western Omnibus Trust as Beneficiary

Buses and coaches are a big part of our national history. From Paddington to Penzance, along the corridor tracked by the Great Western Railway, many famous bus companies have helped to shape and even define the communities they've served.

The Thames Valley & Great Western Omnibus Trust (TV&GWOT) aims to keep alive the rich history and memories of these companies, by restoring and preserving surviving vehicles, maintaining its museum and archive collection, and providing the public with access.

Principal operators within the Trust's scope are shown here but they are complemented by an array of independent enterprises.



TV&GWOT was established as a company limited by guarantee and a charity in 2008.

It is now a strong voluntary organisation with bases in Berkshire and South Devon. It has earned a reputation for high quality restorations, professionally run events, and innovative research and publications. An ever expanding group of Supporters provides skills, energy and enthusiasm to sustain the Trust.

Legacies and bequests help TV&GWOT develop and fund the collection care and use. People often ask how they can contribute to continuing the Trust's work beyond their own lifetime. This brochure provides information to help prospective donors formalise their wishes.

Principles of a Legacy

By leaving a gift in your will to TV&GWOT, you can help preserve the transport heritage of the Great Western Road Motors and their successors who operated bus services across the Thames Valley and West Country areas, from Paddington to Penzance.

As a registered charity neither TV&GWOT nor your beneficiaries need pay any inheritance tax on bequests from your estate.

Thank you for considering TV&GWOT as a beneficiary in your Will. Legacies, whatever their size and whether financial or material, are received with gratitude and respect. They make a valued contribution and help preserve the collection for future generations.

Legacies can be a sum of money or the residue of your estate (once bequests to family and friends have been made and all other dues paid). Bequests might be your transport collection or specific items from it, or other things like stocks and shares.

Legacies to TV&GWOT's 'general charitable purposes' go to the education of the public in the transport heritage, through the preservation of the collection and mounting of events for people to enjoy. Legacies are not spent on administration. You can add a rider to guide TV&GWOT's Trustees expressing your preference for how the legacy is used. This will be respected as far as practicable but allowing discretion ensures a legacy cannot be invalidated due to unforeseen circumstances.

Setting your wishes down in a Will ensures your intentions will be met. It gives you peace of mind and is helpful to those eventually dealing with your estate. We recommend that you consult an expert when drawing up your Will but alternative forms of wording are suggested opposite for you to consider.



Example wording in a Will:

Legacy of cash:

I give free of tax to the Thames Valley & Great Western Omnibus Trust (Registered Charity No. 1125980) whose registered office is at Ledger Farm, Forest Green Road, Fifield, Maidenhead SL6 2NR, **the sum of £_____ (in figures and words)** to be used for its general charitable purposes. I declare that the receipt of the Treasurer or other proper officer of the said Trust shall be full and sufficient discharge to my Executors.

Legacy of residual estate:

Subject to the payment of my debts and testamentary expenses, I give the whole of my estate not otherwise disposed of by this my Will to the Thames Valley & Great Western Omnibus Trust (Registered Charity No. 1125980) whose registered office is at Ledger Farm, Forest Green Road, Fifield, Maidenhead SL6 2NR, to be used for its general charitable purposes. I declare that the receipt of the Treasurer or other proper officer of the said Trust shall be full and sufficient discharge to my Executors.

Bequest of Collection/Item(s):

I give free of tax to the Thames Valley & Great Western Omnibus Trust (Registered Charity No. 1125980) whose registered office is at Ledger Farm, Forest Green Road, Fifield, Maidenhead SL6 2NR, ***my collection of transport memorabilia and ephemera***, to be retained or disposed of at the discretion of its Trustees in furtherance of the Charity's charitable purposes. I declare that the receipt of the Treasurer or other proper officer of the said Trust shall be full and sufficient discharge to my Executors.

***Notes*:** This may be edited to describe your collection or to identify specific item(s). In such instances it can be helpful to your Executors and to ensure your intentions are followed if you list or indicate the location of the items you wish to bequeath in supplementary instructions.

If you are bequeathing material (including photographs) which is your own work and thus your own copyright, it is important to specify separately in writing that you transfer this right to TV&GWOT (if that is your intention). If material is not by you, then this should also be made clear to avoid inadvertent infringement of copyright.

If you are considering bequeathing a vehicle, other large object or property to TV&GWOT, the Trustees would particularly welcome early discussion of potential arrangements. There may be a cost in transporting it to a Trust site and/or for its ongoing storage and care and it will be important for planning to be in place with sufficient provision in your Will to ensure that your wishes, the vehicle and the Trust are all protected when the time comes. Discussions would be in strict confidence.

