

## LEAVING A LEGACY TO US

Writing a Will is one of the most important decisions you are likely to make and we appreciate that it is very personal. However, should you wish to leave a legacy to The B17 Steam Locomotive Trust, please be assured that any gift, irrespective of size, is vitally important to the Trust and it will be used wisely to ensure the long term future of the project. This is our commitment to you.

As The B17 Steam Locomotive Trust is a registered charity, legacy gifts and donations will also be free of inheritance tax (see details overleaf).

### WHAT SORT OF LEGACY COULD I LEAVE?

A Residuary Legacy is a percentage of all that remains after your expenses and other legacies have been paid. A residuary legacy is the best way to benefit the Trust because it is unlikely to be affected by inflation. Using this method, you can be sure that your gift is always within your means, whatever your financial situation in later life. Alternatively, you may wish to consider a Pecuniary Legacy - a gift of a specific sum of money or a Specific Legacy, for an item of value such as a house, shares, railway artefacts, books or photographs.

You may wish to relate any of these to funding a specific component or task. However, choosing to make an unrestricted gift will enable the Trust to direct funding to areas of greatest need, which will change as the project progresses.

Income sources generated by donations and legacies are vitally important to our financial well being. These will permit us to continue with locomotive development and construction activities that would otherwise be difficult to achieve.

#### Always make a will

**Deposit this will with either a solicitor, your bank or an executor**

**Check that your executors are prepared to carry out your wishes**

**Notify any beneficiary that you are leaving a legacy**

## IN MEMORIUM

Making a donation to the B17 Steam Locomotive Trust in memory of someone special to you is a wonderful way to ensure that their memory lives on, whilst supporting interests that were important to them.

At your request the Trust can set up a "Living Memory Fund" in your loved one's name, to which friends and family may then make contributions to. A great comfort at a time of loss, a living memory fund celebrates a life, whilst helping to ensure the future of the project.

### DONATIONS

A gift of whatever size makes a difference. If you are eligible to "GIFT AID" your donation enables the Trust to claim back your contribution of income tax already paid by you at the basic rate from HMRC.

A regular monthly sum will provide invaluable help and improve budget planning and efficiency in the use of funds for construction and operation of the new locomotive.

A single donation will be much appreciated and will be allocated in support of a specific component/activity.

**Please complete the appropriate sections on the detachable form in this leaflet.**

### FIND OUT MORE

We would be happy to talk with you to explain how your valuable gift can help the objectives of the Trust.

You can contact us by entering your personal contact details on the attached form and sending them to the address given overleaf, telephone the Trust's chairman, Brian Hall, on 07527 670436, or email [b17enquiries@gmail.com](mailto:b17enquiries@gmail.com) and we will be pleased to assist you.

## MAKE A DONATION IN MEMORY

### I WISH TO MAKE A REGULAR DONATION

of £..... per month.

Please complete your Standing Order Mandate payable to the bank details below.

### I WISH TO MAKE A SINGLE DONATION

I enclose payment of £ .....

Signed .....

Date .....

### GIFT AID DECLARATION (Please read statement overleaf)

I wish to Gift Aid my donation and any donations I make in the future or have made in the past 4 years to The B17 Steam Locomotive Trust.

Circle YES / NO as appropriate.

**Boost your donation by 25p of Gift Aid for every £1 you donate.**



*Gift Aid is reclaimed by the charity from the tax you pay for the current tax year. Your address is required to identify you as a current UK taxpayer.*

SIGNED

DATE

Cut here

### OUR BANK DETAILS

Please pay Barclay's Bank PLC

5/6 High Street, Hitchin, Herts. SG5 1BJ

ACCOUNT NAME: The B17 Steam Locomotive Trust

ACCOUNT No.: 53357821

SORT CODE: 20-41-12

**Please fill in your standing order details overleaf and send to your bank or building society.**

**YOUR PERSONAL DETAILS**

NAME .....

ADDRESS .....

.....

POSTCODE ..... TEL .....

E-MAIL .....

**GIFT AID DECLARATION (Please read before signing overleaf)**  
 I am a UK taxpayer and I understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay the difference. **Note that Gift Aid cannot be claimed without your full name and address.**

Please notify us if you wish to cancel this declaration, change your name or home address, or no longer pay sufficient tax on your income and/or capital gains.

Higher or additional rate taxpayers who wish to receive the additional tax relief due, you must include all your Gift Aid donations on your Self-Assessment tax return or ask HM Revenue and Customs to adjust your tax code.

**Please delete the above statement if you are not a UK Taxpayer or if you do not wish your contributions to be made under the Gift Aid provision.**

**Please return top half of form to:-**



The B17 Steam Locomotive Trust,  
 171 Clifton Road, Shefford, Beds. SG17 5AG

**YOUR STANDING ORDER DETAILS — Please send this portion to the Manager of your bank or building society:-**

BRANCH NAME/ADDRESS.....

YOUR ACCOUNT NAME.....

YOUR ACCOUNT NUMBER.....

YOUR SORT CODE.....

MONTHLY AMOUNT TO BE DEBITED £.....

DATE EACH MONTH FOR DEBIT ...../...../.....

DATE OF FIRST PAYMENT...../...../.....

CONTINUE UNTIL DATE...../...../.....

OR UNTIL FURTHER NOTICE. (Payee details on reverse.)

SIGNED ..... DATE.....

**LOCOMOTIVE BACKGROUND**

Introducing an ambitious and exciting plan to bring back to life a much loved locomotive that did not survive into preservation. The B17 'Sandringham' class, designed by Sir Nigel Gresley, were built over a 9 year period from 1928 and all were named after country houses, football clubs and local county regiments associated with the former LNER. The first of class was named SANDRINGHAM after the Royal Family's Norfolk residence; thereafter, the whole class became known as 'Sandringhams'.

B17s operated on the LNER network across the routes of the eastern counties and later BR Eastern Region for over 30 years, up to 1960 when the last few were scrapped. They worked mainline expresses between Liverpool Street, King's Cross and the major centres of East Anglia including seaside resorts and ports, and between Manchester. They were allocated to Royal Train duties when members of the Royal Family stayed at the



**INHERITANCE TAX**

Inheritance tax is the tax paid on your estate. This is all you own at the time of your death, less what you owe. Assets include property, possessions, money and investments. Legacies to registered charities are paid from an estate before it is assessed for inheritance tax. Tax is payable at the rate(s) set by the Government on the amount above the inheritance tax threshold. Not everyone pays inheritance tax, as it only applies if the taxable value of your estate when you die is above a certain amount defined by the Government.

**For guidance on inheritance tax and legacy gifts you are advised to speak to your solicitor or financial advisor.**



**GIFTS AND LEGACIES**

Help us on our mission - to create a new build LNER Class B17 4-6-0 express passenger locomotive to operate for enjoyment of future generations on the national railway and at heritage railway centres.

It is our aspiration that the 'Spirit of Sandringham' will be built entirely in the UK, and will also provide educational and skills training opportunities for people in apprenticeships and other schemes associated with engineering, manufacturing and construction activities.

For more details on The B17 Steam Locomotive Trust please view our website: [www.b17steamloco.com](http://www.b17steamloco.com)



*The B17 Steam Locomotive Trust (Spirit of Sandringham) is not associated with the Sandringham Estate.*