



**British Legion (Kenya), branch of the Royal British Legion having a postal address of
P. O. Box 663, 00502, Nairobi**

THE BRITISH LEGION KENYA LEGACY PROGRAMME

These notes have been prepared by the Executive Committee of British Legion (Kenya) as a service to friends of the Legion who may wish to express their support for the charity by means of a legacy.

It is simple to include a legacy to British Legion (Kenya) in your Will. It can be done at the time you make your Will, or, if you have already made your Will, you can add a Codicil to provide for the bequest.

Gifts may be earmarked for general purposes, or if you wish, directed towards either two specific areas of British Legion Welfare activity: the **Poppy Appeal** or the **Askari Appeal**:-

The Poppy Appeal provides welfare support to a small but very dependent group of ex-servicemen and women. Some of whom were born in Kenya, and others came to settle or retire here. We subsidise living expenses, pay medical bills and in some cases assist in relocation to more supportive environments. Occasionally we face the sad task of arranging funerals.

The Askari Appeal was initiated in 2000 to help Kenyan Africans who served in the Crown Forces, prior to independence – predominantly in the Second World War. They really are a forgotten generation in Kenya and they benefit from no welfare support from the Republic. Working in partnership with Kenya Armed Forces Old Comrades Association, British Legion (Kenya) disburses individual welfare grants to bona fide cases.

Types of Legacy

There are four common forms of legacy. We strongly recommend that you seek professional legal advice in deciding which is the most appropriate for you.

1. The Pecuniary Legacy

This involves leaving a named amount of money. The disadvantage of this method is that inflation will erode its value over the years.

In order to get around this problem you could set aside a specific proportion of your Estate to your beneficiaries as follows:

2. The Residuary Legacy

The way to protect the real value of your gift is to make what is known as a residuary legacy – which may be a percentage or fraction of your Estate after your other specific bequests have been made.

3. A Life Interest (Reversionary Legacy)

We fully appreciate the concern everyone has for those we leave behind, and the understandable wish to ensure that proper provision is made for them first. In these circumstances a Reversionary Legacy can be used, whereby you leave money or your Estate (or a percentage of it) to British Legion (Kenya) after the death of your spouse, relative or friend. This means that they enjoy your assets during their lifetime, but afterwards the balance, or whatever portion you have designated, reverts to the British Legion.

4. The Conditional Legacy

If you feel that you would like to leave all or part of your Estate to the British Legion (Kenya), yet you also feel that someone else has a stronger claim to the gift, then you can make a conditional Legacy. This means that you leave your bequest to particular person, but in the event that he or she should predecease you, then the bequest would to the British Legion (Kenya).

Life Assurance

There is a further way of providing for British Legion (Kenya) during lifetime for its benefit after your death. A life assurance policy can be taken out on your life with British Legion (Kenya) as the beneficiary. Thus, for a modest premium, you can ensure substantial benefits for the charity.

Form of Gift

Your gift can take any form, and it is quite possible to leave gifts in the form of shares or items of property such as pictures or other valuables. British Legion (Kenya) can then sell the assets and utilize the proceeds.

The First Step – making a non-binding pledge

If you decide to leave to the British Legion, we would be grateful if you could let us know by completing the Pledge Form attached. We will also be happy, if you so desire, to arrange a meeting at which you can discuss your wishes with regard to your bequest.

You do not need to give details of your legacy, nor is the Pledge Form in any way binding. It is simply a statement of your present intentions.

Making a Bequest

The following are some sample wordings for making Pecuniary, Residuary and Gift in Kind Bequests, as well as an example or a codicil to an existing will.

We would recommend, however, that in all cases you discuss your requirements first with your legal adviser in the light of your personal circumstances.

Sample Pecuniary Legacy Clause

“I give the following Legacy absolutely:
To the British Legion (Kenya of P. O. Box 663, 00502, Nairobi.

The sum of for the general purposes*/Poppy Appeal* of the British Legion (Kenya) with full power to expend capital as well as income for such purposes and I direct that a receipt of the Treasurer or other authorized officer for the time being shall be a good and sufficient discharge to my executors for the payment to the British Legion.

Residuary Legacy

“I devise and bequeath (a percentage) of the residue of my estate:
To the British Legion (Kenya) of P. O. Box 663, 00502, Nairobi.

Such sum to be applied for the general purposes* Poppy Appeal** of the British Legion (Kenya) with full power to expend capital as well as income for such purposes and I direct that a receipt of the Treasurer or other authorized officer for the time being shall be a good and sufficient discharge to my executors for the payment to the British Legion.

A Request in Kind

I make the following charitable gift absolutely:
To the British Legion (Kenya) of P. O. Box 663, 00502, Nairobi.

{a clear description of the item(s) to be bequeathed}

With full power to realise such assets and to apply the proceeds for the general purposes*/Poppy Appeal*/Askari Appeal* with full power to expend capital as well as income for such purposes and I direct that a receipt of the Treasurer or other authorized officer for the time being shall be a good and sufficient discharge to my executors for the payment to the British Legion.

A Codicil adding a bequest to an existing Will

I (*your name*) of (*your address*) declare this to be the first (*or second etc.....*) Codicil to my Will dated the (*date*) of (*month and year*) (“*My Will*”)

In addition to the legacies given by me My Will, I give the following further charitable legacy absolutely:
To the British Legion (Kenya) of P. O. Box 663, 00502, Nairobi.

The Sum of { } for the general purposes *Poppy Appeal*/Askari Appeal* with full power to expend capital as well as income for such purposes and I direct that a receipt of the Treasurer or other authorized office for the time being shall be a good and sufficient discharge to my executors for the payment to the British Legion.

In all other respects I confirm My Will.

- *delete as appropriate*

Note: A codicil needs to be separately signed, dated and witnessed by two independent witnesses as for a Will in its own right.

Pledge Form

If you decide to include a legacy to the General Purposes, the Poppy Appeal or Askari Appeal in your Will, please let us know by completing and returning this form.

This Pledge does not commit you in any way. It is simply a statement of your present intentions.

On receiving the Pledge, you will be contacted to discuss the details of your legacy and to provide any further information you require.

All correspondence and discussion will be treated in the **STRICTEST CONFIDENCE**.

I wish to include a legacy to the General Purposes / Poppy Appeal / Askari Appeal (delete as applicable):

Name: _____

Address: _____

Telephone _____

Email address _____

Signature _____ **Date** _____

**This form should be returned to:
The Treasurer, British Legion (Kenya), at the address on this letterhead**