



Information for Executors

Taking on the role of an Executor can be a daunting task and comes with a great deal of responsibility.

Unlike individual beneficiaries, charities have quite particular requirements as to what information and documentation they require from an Estate. These requirements are often dictated by their auditors. They are also bound by specific rules in terms of what they can and cannot agree to. For example, a charity cannot simply agree to additional gifts being made to individuals or charities who were not named in the Will without first obtaining specific authorisation from the Charity Commission (these are known as ex gratia payments).

When a Grant of Probate has been issued, the deceased's Will is no longer private and instead becomes a publicly accessible document. Redwings Horse Sanctuary, in common with many charities, subscribes to a company called Smee & Ford. Smee & Ford provide a probate notification service whereby they notify charities when a Grant of Probate has been issued and the charity has been named in the Will.

If we receive a legacy notification from Smee & Ford and we have not been in contact with you (in your capacity as Executor) previously, we will generally write to you to pass on our condolences and provide you with the correct contact details for the charity to avoid any confusion or delay later.

Please do not be offended if we write to you in these terms. The letter is not a demand for money. We are also not expecting you to have dealt with the administration of the deceased's Estate by that time. It is simply a letter of introduction and an offer of assistance or to answer any queries you may have. We have many years' experience of estate administrations and are happy to share our knowledge and expertise where appropriate.

The Institute of Legacy Management (ILM) has produced some helpful for guidance for Executors dealing with an Estate which has charitable beneficiaries. You can access the guidance here: <https://legacymanagement.org.uk/administration-of-a-charitable-estate-guide-for-executors/>.

If you are dealing with an Estate where the Will includes a legacy to Redwings Horse Sanctuary, you may find the following information useful.



Types of legacy

Pecuniary – This is a set sum of money stated in the Will (i.e. £100 or £1,000).

Specific – This is a specific item (such as a collection of ornaments or a holding of shares) or the proceeds of a particular asset (such as a named bank account or investment).

Residuary – This is a share or percentage of the remaining balance of an Estate once all other legacies and debts have been paid.

Addresses

The address for Redwings in the Will may be one of several. Most will include the address of our Head Office. However, we also have five visitor centres across the UK, which may have been included instead. We also encounter many Wills which still feature the address of our former Head Office. Any of the addresses below (or slight variations thereof) are still Redwings Horse Sanctuary.

- Norwich Road, Hapton, Norfolk, NR15 1SP (This is our current address and the one that should be used for all postal correspondence)
- Hill Top Farm, Hall Lane, Frettenham, Norfolk, NR12 7LT (This was the address of our Head Office before we moved to Hapton)
- Broadlands, Epping Road, Roydon, Nazeing, Essex, EN9 2DH (Ada Cole Visitor Centre)
- Spa Lane, Aylsham, Norfolk, NR11 6UE (Aylsham Visitor Centre)
- Caldecott Hall, Beccles Road, Fritton, Norfolk, NR31 9EY (Caldecott Visitor Centre)
- Milton of Ogil, Glenogil, Forfar, Angus, DD8 3SQ (Redwings Mountains)
- Banbury Road, Kineton, Banbury, Warwickshire, CV35 0RP (Oxhill Visitor Centre)
- Coxstone Farm, St Maughans, Monmouth, Monmouthshire, NP25 5QF (Former site of the Society for the Welfare of Horses and Ponies)

Mergers and Registered Charity Numbers

Over the years, Redwings Horse Sanctuary has merged with several charities. Those charities became part of Redwings and all legacies to the following charities will now be payable to Redwings instead.



2005 – Merger with Ada Cole Memorial Stables (registered charity number 210395)

2015 – Merger with Mountains Animal Sanctuary (registered charity number 290356)

2019 – Merger with the Society for the Welfare of Horses and Ponies (SWHP) (registered charity number 266247)

Our registered charity number is 1068911 (Scottish charity number SCO045070). Redwings Horse Sanctuary previously had the registered charity number of 295763. If this number features in the Will you have, we are still the same charity and the gift still applies.

You may find the Will includes the following “Registered Charity Number 03524502”. This is actually our registered company number but it is still Redwings Horse Sanctuary.

Any details relating to our charity status can be checked by searching the Charity Commission’s website (www.gov.uk/government/organisations/charity-commission).

Payments

If you are an Executor and you are wishing to make a payment to Redwings, you can do so in the following ways:

By cheque - Made payable to ‘Redwings Horse Sanctuary’ and sent to The Legacy Manager, Redwings Horse Sanctuary, Norwich Road, Hapton, Norfolk, NR15 1SP.

By bank transfer – Please contact our Legacy Manager Katie on 01508 481030 or kfulcher@redwings.co.uk and she will provide you with our bank details and appropriate reference to quote.

By online payment – If you intend to make a payment using our online donation function, please can you follow up your payment with either a telephone call or email to our Legacy Manager Katie, confirming the name of the deceased, your details and the value of the payment made. She can then make sure the legacy is properly recorded to meet our audit obligations and she can also ensure you receive the requisite receipt. Please call Katie on 01508 481030 or email her at



kfulcher@redwings.co.uk.

Audit Requirements

Depending on the type of legacy Redwings is due to receive, our auditors require us to have different paperwork on file. When you are ready to pay the legacy due to Redwings, we will ask for the following:

For pecuniary or specific legacies - A copy of the relevant clause in the deceased's Will which refers to the gift to Redwings Horse Sanctuary. There is no need to provide a copy of the whole Will. If you are not able to enclose a photocopy of the relevant clause, including a transcription of the wording used in the Will in your covering letter will suffice.

The reason our auditors require us to have this information is the Will may state that the legacy must or must not be used for a specific purpose. By having a copy of the clause on file we have evidence that we are the correct recipient of the gift and that we have used it for the purpose intended by the deceased.

For residuary legacies – A copy of the whole Will, as well as a copy of the Estate Accounts. The Estate Accounts do not have to be complicated and they can be set out however you wish. The important thing is that they detail the assets that you have collected in (such as bank accounts, investments, proceeds of sale of a property), the liabilities you have paid (such as probate fees, utility bills, Estate Agent fees, etc.) and how the balance has been distributed.

The Estate Accounts are vital as they are the only way we can confirm that Redwings has received the benefit that the deceased intended. Please do not be offended by a request to provide this information. All Executors (be they solicitors or individuals) are asked to provide the same documentation. We are incredibly grateful to all Executors for the work they do and our requests for information should not be taken as an insult and nor are we questioning your ability to carry out the role of Executor.

Paperwork can be sent either by email to kfulcher@redwings.co.uk or by post to The Legacy Manager, Redwings Horse Sanctuary, Hapton, Norfolk, NR15 1SP.

Our Legacy Manager is the person able to provide you with a valid receipt for the legacy on behalf of Redwings Horse Sanctuary.



If you have any further queries, please do not hesitate to contact our Legacy Manager Katie Fulcher on 01508 481030 or by emailing kfulcher@redwings.co.uk or legacies@redwings.co.uk.