



the
westway
a community hub for all

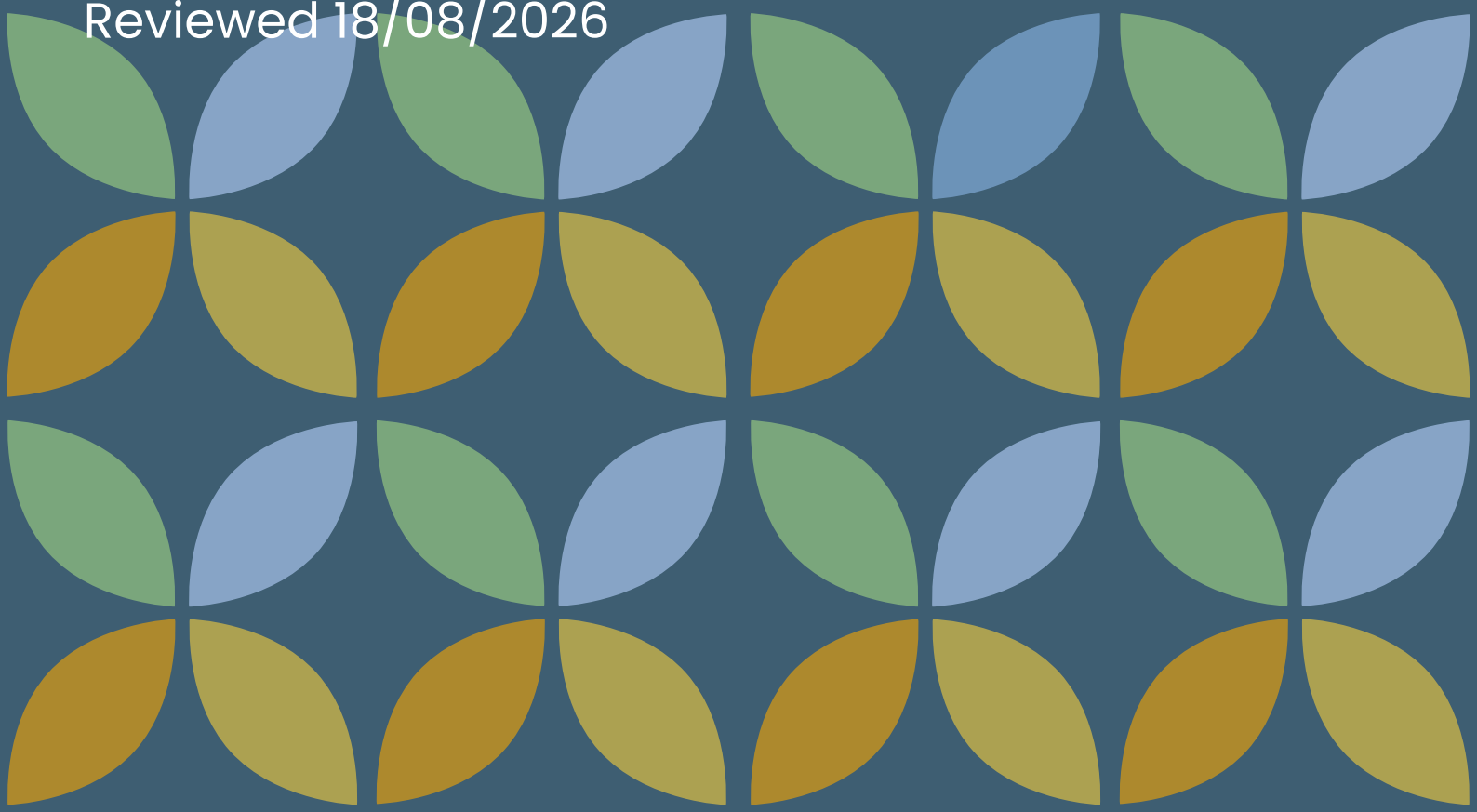
Legacy Policy

Lead: Andrew Brownless & Caroline Liggins

Effective Date: 20.01.2025

Review Date: 25.07.2026

Reviewed 18/08/2026



1. Purpose

Thank you for considering to leave a legacy gift to The Westway. We appreciate that this can be a very difficult time for those managing legacy responsibilities.

This policy outlines The Westway's approach to the acceptance, management and recognition of gifts left to the charity in wills (legacies). The aim is to ensure legacy giving is encouraged and managed ethically, legally, and with due care for donors, their families and the long-term reputation of the charity.

2. Scope

This policy applies to:

- All legacy donations made to The Westway
- Staff, Trustees, and any volunteers involved in fundraising or finance
- Solicitors, executors, or family members working with us during the administration of an estate

3. Types of Legacy Gifts

We are able to accept the following types of legacy gifts:

- **Pecuniary legacy:** A fixed sum of money
- **Residuary legacy:** A percentage or share of the estate after debts and other gifts are paid
- **Specific legacy:** A particular named item (e.g property, shares)
- **Reversionary legacy:** A gift made after the death of another beneficiary (e.g life interest)

4. Types of Legacy Gifts

The Westway promises to:

- Treat all legacy donors and their families with respect, sensitivity and confidentiality
- Acknowledge gifts with gratitude and discretion
- Use legacy gifts in accordance with the donor's wishes where expressed
- Ensure all communications regarding legacies are clear, honest, and never intrusive or pressured
- Encourage donors to seek professional legal advice when exploring legacy gifts

5. How Legacy will be used

Unless a legacy is **restricted** by the donor for a specific purpose, legacy gifts will be treated as **unrestricted funds**, to be used where the need is greatest.

Where possible, we will discuss specific intentions with donors during their lifetime to ensure clarity and feasibility.

6. Recognition and Stewardship

We respect the wishes of those who wish to remain anonymous.

For those who are happy to be acknowledged, we are happy to discuss acknowledgement options.

7. Managing and Administering Legacy Gifts

The Westway will manage legacy gifts by:

- Appointing two named individuals to oversee the management of Legacy Gifts.
- Act promptly, sensitively, and efficiently in communicating with executors, solicitors, or family members.
- Maintain a clear internal process for recording and reporting legacy income.
- Seek legal advice where needed on complex estates or contested gifts.
- Ensure that legacy income is reported in line with Charity Commission guidance and SORP requirements.

See more regarding SORP:

<https://www.gov.uk/government/publications/charities-sorp-2005>

8. Named Legacy Leads for the Westway:

The Westway has two dedicated individuals to oversee the management and administration of Legacy Gifts in line with this policy. They are:

Trustee – Andrew Brownless

andrew.brownless@thewestway.org

Chair of the Trustees – Caroline Liggins

caroline.liggins@thewestway.org

Communications may initially come through alternate channels, ie direct to the Westway Centre Manager. In line with this policy, when this happens, whoever received the communications will then pass the management to the named leads.

9. Refusal of Legacy

We reserve the right to refuse a legacy where:

- The conditions attached are not aligned with our charitable objectives or policies
- Accepting the gift would result in a financial or reputational risk
- The cost of accepting the legacy outweighs the benefit

All refusals will be approved by the Board of Trustees and recorded formally.

10. Record Keeping

All legacy intentions and gifts will be recorded securely and confidentially, in line with GDPR and data protection legislation.

11. Review and Approval

This policy will be reviewed annually or in response to changes in legislation or Charity Commission guidance.

This policy was written by the Charity Manager, Abi Chapman on the 18/07/2025. The lead was amended on the 20/01/2026 to change named lead.

This policy was approved by trustees on the 06/11/2026

The Westway is a registered charity in England and Wales (No. 1188850)