



**DEVON GENERAL**  
**Omnibus Trust**

## LEGACIES AND BEQUESTS

Thank you for considering the Devon General Omnibus Trust as a beneficiary in your Will. By leaving a gift in your Will to DGOT, you can support our work to advance the education of the public in the history of public road transport, and in particular the history of the Devon General Omnibus & Touring Company and its successors, through our collection of preserved buses. Please note the information below is intended to provide useful guidance only.

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### Principles of a Legacy

Setting down your wishes 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.

Legacies of whatever size, and whether financial or material, are received with gratitude and respect. They make a valued contribution to DGOT's work and help to preserve our collection for future generations. As a registered charity, neither DGOT nor your beneficiaries need pay any inheritance tax on such bequests from your estate.

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 DGOT's 'general charitable purposes' go to the education of the public in Devon's transport heritage, through the preservation of our collection and by enabling our buses to attend events for people to view them and travel on them.

We recommend that you consult an expert when drawing up your will, but suggest the following alternative examples of wording for you to consider:

#### Legacy of cash:

I give free of tax to the Devon General Omnibus Trust (Registered Charity No. 1153451) whose registered office is at 22 Sandstone Road, Swindon SN25 2FE, **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 Devon General Omnibus Trust (Registered Charity No. 1153451) whose registered office is at 22 Sandstone Road, Swindon SN25 2FE, 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 Devon General Omnibus Trust (Registered Charity No. 1153451) whose registered office is at 22 Sandstone Road, Swindon SN25 2FE, **\*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) that is your own work and thus your own copyright, it is important to specify separately in writing that you transfer this right to DGOT (if that is your intention). If material is not by you, then this should also be made clear to avoid inadvertent infringement of copyright. PTO...*

**\*Notes continued\***

*If you are considering bequeathing a vehicle to DGOT, the Trustees would particularly welcome early discussion of potential arrangements. There may be a cost in transporting it to the Trust's 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.*

**Amending your Will by codicil**

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

Example wording could be:

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

In addition to any legacies given by my said Will, I give free of tax to the Devon General Omnibus Trust (Registered Charity No. 1153451) whose registered office is at 22 Sandstone Road, Swindon SN25 2FE, 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

Signature of Witness.....  
Witness Name.....  
Witness Address.....

Signature of Witness.....  
Witness Name.....  
Witness Address.....

If you have queries on any aspect of donations, legacies or bequests for the benefit of DGOT, please do not hesitate to contact the Trustees for a confidential discussion without commitment - contact details below.

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**DEVON GENERAL OMNIBUS TRUST**  
**Registered Charity No. 1153451**  
**Registered office: 22 Sandstone Road, Swindon SN25 2FE**  
**enquiries@dgot.org.uk**  
**www.dgot.org.uk**

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