



Charity number 270923

Please leave us a gift in your Will...
A Legacy of Helping People with
Disabilities Share in Life's Opportunities



Lake District Calvert Trust

The Lake District Calvert Trust is a registered Charity which enables children and adults with disabilities, along with their families and friends, to achieve their potential through the challenge of outdoor adventure.

Research shows that the Calvert Trust Experience provides something of much longer-term value than just an adventurous few days spent in the outdoors.

We work with people who have a disability – from mild to the most profound disability - using uniquely adapted facilities that have been continuously developed over 45 years. No matter the level of disability, our visitors can share the same adventure as their able-bodied peers and relatives. The Programmes and pioneering approach are delivered by an equally unique staff team with skills and experience found nowhere else.

Lake District Calvert Trust has grown from being the UK's first dedicated Activity Centre for people with disabilities, to welcoming around 3,500 visitors to stay each year. These include



individuals, family groups, specialist schools, accessible sports clubs, disability charity groups, supported living organisations and care homes, from across the UK.

Our specialist facilities are also well used by the local community, with over 12,000 visits to our hydrotherapy pool in a year. Our riding stables ran nearly 1,800 sessions for local riders and host the local Riding for the Disabled Association group.



The Original Calvert Legacy ... **William Wordsworth**

In 1794, orphaned and without anywhere to live, William and Dorothy Wordsworth were given their first home, just outside Keswick, rent free, by the Calvert Family. Raisley Calvert was a childhood friend of Wordsworth and believed in Wordsworth's potential as a poet. Raisley died, aged 21, of tuberculosis. In his Will, he left Wordsworth the legacy of £900 that was to give him the independence that would allow him to devote himself entirely to poetry and become the Poet Laureate we know today. Wordsworth immortalised his friend's legacy in published word:

'Calvert! It must not be unheard by them who may respect my name, that I to thee owed many years of early liberty'

Sonnet to the memory of Raisley Calvert

Oliver's Story

Oliver requires specialist care having suffered a brain injury when he was two days old which left him with sight loss, cerebral palsy, epilepsy, autism and learning difficulties.

Visits to the Calvert have allowed him to take part in activities such as canoeing, abseiling and rock climbing and showed him "nothing is impossible", according to his mother, Sarah

"Calvert has made the Lake District accessible to us all and Oliver absolutely loves it there. It's probably the only place we do everything together. It's really helped to build memories."



You Can Make a Difference

- As a charity, we are reliant on the generosity of those who believe in our aims. We welcome support which enables those with the most complex and profound disabilities to experience the joy and life-enhancing benefits of the 'Calvert Experience'.
- By leaving a Legacy to Calvert, you will ensure that many thousands of people with disabilities will continue to benefit from the Calvert Experience and the impact of your generosity will endure for many years to come.
- You will also in turn support people from our local, Lake District community, who help bring this together.

"Calvert plays a huge part in keeping me feeling alive and totally included in our world"

Natalie Parr



Our Promise to You

- Every £1 you give will go directly towards achieving our vision, values, and mission
- We will answer any of your questions openly
- We value your gift, large or small
- We recognise your right to privacy
- You can always change your mind



“What you leave behind is not what is engraved in stone monuments, but what is woven in the hearts of others”

Pericles

How to Leave a Gift in Your Will

- There are three main types of gift you can include in your Will:
 - **Residuary gift:** a share of whatever is left after all debts have been paid and other gifts made,
 - **Pecuniary gift:** a fixed sum of money, or
 - **Specific gift:** a particular item, for example your house.
- There is no inheritance tax payable on any gift and you may qualify for a reduced rate of inheritance tax.
- You may make an addition to an existing Will via a Codicil form which is stored with your Will.
- We recommend you speak with a solicitor or professional Will writer
- Please inform your solicitor or writer you would like to leave a gift to:
 - Charity name : **Lake District Calvert Trust**
 - Address: **Little Crosthwaite, Keswick. CA12 4QD**
 - Charity number: **270923**

Suggested Wording for Your Will

It is very simple to make a gift to the Lake District Calvert Trust in your will. Should you decide to make a gift of a fixed amount, your professional adviser may find the following wording helpful:

- *'I/We give to The Lake District Calvert Trust of Little Crosthwaite, Keswick CA12 4QD, Registered Charity Number 270923, to be applied for the general purposes of The Lake District Calvert Trust, the sum of (amount in figures, amount in words) and I/we direct the receipt of a proper officer for the time being of The Lake District Calvert Trust shall be a complete discharge to my/our Executors.'*

If you would like to leave a share of the residue of your estate, set out below is suggested wording which your professional adviser can use:

- *'I/We give all/a share of (please state fraction/percentage) the residue of my/our estate to The Lake District Calvert Trust of Little Crosthwaite, Keswick CA12 4QD, Registered Charity Number 270923, to be applied for the general purposes of The Lake District Calvert Trust, and I/we direct the receipt of a proper officer for the time being of The Lake District Calvert Trust shall be a complete discharge to my/our Executors.'*



Seeking Professional Advice

This is general information and is not intended to provide specific advice about legal or tax implications of charitable giving. Before making a legacy gift to The Lake District Calvert Trust we recommend that you seek professional legal advice.



Come and See How We'll Put Your Gift to Work

- If you feel comfortable to let us know you have included us in your Will, or are considering it, we would be delighted to welcome you to join our 'Calvert Family'
- We will invite you join us at our annual friends and supporters' events
- We will keep you updated on our work through regular newsletters and updates
- If you would like your gift to remain anonymous then we will support that too
- Follow us on   

Examples of Gifts

Providing our fully accessible activities to guests requires continual investment and your gift will make a big difference:

- £500 will purchase 2 specialist harnesses for climbing and abseiling activities
- £1,000 will provide a profiling bed for a disabled visitor
- £10,000 will support the ongoing care and welfare of our horses
- £25,000 will allow us to renew an adapted sailing dinghy





Contact Us

If you would like to talk with us about a Gift in a Will then please call on **01768 772255** during office hours or email **legacies@calvertlakes.org.uk**

Alternatively, you can write to us at Lake District Calvert Trust Legacies, Little Crosthwaite, Keswick. CA12 4QD



"What I like about the Lake District Calvert Trust is the new opportunities they create for disabled people, young and old. By leaving this gift to Calvert, it's a way for me to continue doing good after I am gone"

Sir James Cropper, Cumbria.
Friend of Calvert Trust