

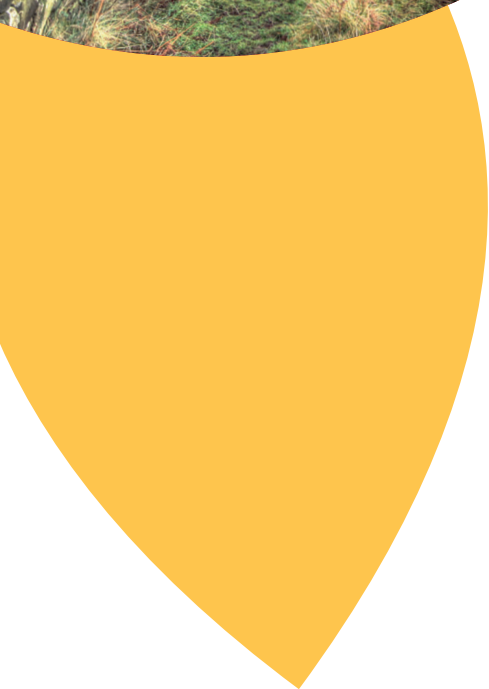
**North East
Will Power**



**Community
Foundation
North East**



Leave a Legacy of Local Impact



Your Legacy

More and more people just like you are choosing to make a unique and lasting difference to their community by including a charitable gift in their will, trust or other estate plans. In doing so, there is a fundamental question to be considered:

Do I want to make a one-time gift, or do I want to make a gift that will last forever?

A single gift to a charity through your will or estate can provide immediate impact. Most charities will use your gift right away, while some may add it to their building or operations fund. Either way, your generosity has a single point of impact.

However, by making a gift to create a named fund which reflects your personal wishes, or to the Community Foundation's Strategic or Collective funds, your gift will not only contribute to the region's vital causes in perpetuity, but will also continue to grow steadily over time.

Your gift is invested, and held as part of a permanent asset for your community, earning income each year to support your chosen causes. Additionally, over time, the amount we distribute will outstrip your original gift.



Funding and Gifting Options

It doesn't matter how large or small the bequest is, we have a range of fund and gifting options to choose from.



Unrestricted Funds

Creating an unrestricted fund allows the Community Foundation to match your generosity with our area's most pressing needs through research, initiatives and funding. You can trust us to adapt to the region's changing priorities now and in the future. This type of fund can be set up with a bequest of £10,000 or more.



Field-of-Interest Funds

Creating a field-of-interest fund means you can choose specific causes for support, to benefit a particular place or interest, such as health, older people or homelessness. You decide on the causes or communities you want to help, and we'll use our expertise to direct support to organisations making the most difference. This type of fund can be set up with a bequest of £25,000 or more.



Designated Funds

Creating a designated fund means that you can name one or more charities you want to benefit every year. We support them every year after checking they're still working effectively. If something goes wrong, we can support an alternative charity, giving you peace of mind that your wishes will be honoured even if your chosen charity no longer operates. This type of fund can be set up with a bequest of £25,000 or more.

Aspects of these funds can also be combined, with a portion of your fund's revenue designated in support of specific charities and the remainder to be used more widely.



Donor-Advised Funds

If you would like to involve an individual/s such as a family member or friend in the decision making for your fund, you may wish to create a donor-advised fund. We will use our expertise to identify and assess charities and community organisations which match your interests and your nominated advisor may then choose those they most want your fund to help. This type of fund can be set up with a bequest of £50,000 or more.



Collective Giving Funds

Or you may choose to leave a gift to one of our collective giving funds, where like-minded people support shared causes. These causes are thematic and/or geographical.

Their Legacy Lives On

Carroll Savage Fund

Jane Carroll used a gift in her Will to establish a fund to support individuals and community groups in her beloved rural Northumberland. Born and raised in Northumberland, Jane worked as a freelance editor and translator into Italian and campaigned very vocally for multiple local issues based around the natural environment, animal welfare and the heritage of Northumberland. She loved music and sang with the Hexham Abbey Festival Chorus.

The fund established in her name awards grants to rural communities and small groups/individuals in Northumberland, covering a wide range of cultural, recreational and environmental projects, and gives support and encouragement to those actively engaged in making a difference to their lives.



Bunty and Teddy Barlow

Bunty and Teddy Barlow used a gift in their Will to support the Vital Sunderland and Vital Newcastle funds at the Community Foundation, where pooled donations and legacies from like-minded people make a bigger impact.

Bunty moved to Sunderland at the age of two and lived in the Ashbrooke area throughout her life. Bunty was a passionate volunteer, giving her time to organisations including the Sunderland Eye Infirmary, and was a great lover of the arts. Teddy worked as Planning Officer for Sunderland City Council and was a qualified architect. The couple lived together on Thornhill Terrace for more than thirty years.

Their legacy reflects their deep connection to the communities they called home. Through collective giving funds, their gift helps to tackle the most pressing issues in both cities and supports local people working to strengthen their communities through social action.



Marian Winship

Marian was a strong advocate for South Tyneside and its community, having been a primary school head teacher there, as well as a co-founder of Action Station (West Harton Churches Action Station as it was originally known) where she was a trustee and director for many years.

Marian chose to leave us a residuary legacy and, following her death in March 2024, the Marian Winship fund was established, with the purpose of "improving the quality of life for people of all ages in the North East of England and specifically in the geographic region of South Tyneside".



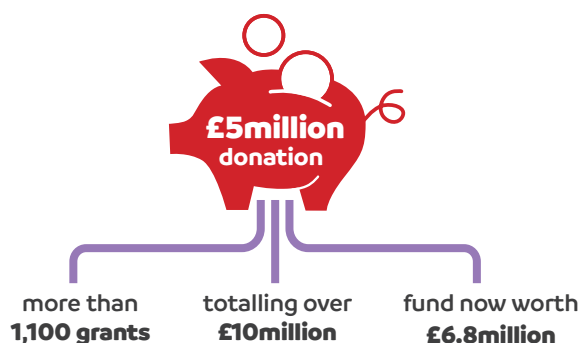
The Power of Endowment

An endowed charitable fund is a powerful tool, both for you and your community. Your gift will continue giving and your fund will keep on growing. In fact, over time, an endowed charitable fund will give considerably more to support your region than the value of the initial bequest.

The Kellett Fund

Douglas Kellett was a businessman who owned much of the land upon which Washington New Town was built. When he died in 1987, he left his estate in trust to benefit his wife, Gwen, during her lifetime and thereafter to charity. He expressed an interest that it should help older people lead an active and fulfilling retirement. Following Gwen's death in 1996 the trustees invited the Community Foundation to set up the Kellett Fund as one of our biggest legacies, £5million, to benefit people in the Third Age.

Douglas's initial £5million legacy donation has been used to make more than 1,100 grants from the Kellett fund, totalling over £10million. As significantly, the fund itself is now worth £6.8million, over 30% more than the value of the initial donation.

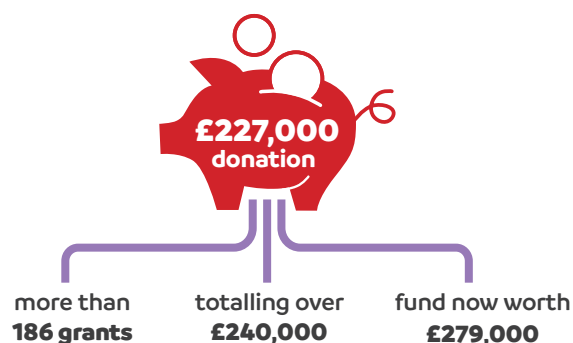


Ted Weekes Fund

Dr Ted Weekes was a distinguished biochemist who settled in the North East after studying at Newcastle University. A passionate advocate for education, he served as a councillor for Northumberland County and Blyth Valley councils and chaired the Education Committee.

Ted pledged a legacy to the Community Foundation in 2000, and following his death, the Ted Weekes Fund was established in 2001 to support children and young people in Seaton Sluice and New Hartley, places he was closely connected to.

Ted's initial £227,000 legacy has supported over 186 grants totalling more than £240,000. The fund is now worth over £279,000, 23% more than the original gift, continuing to invest in the future of local young people.



Your partner for lasting local impact

Community Foundation North East is trusted by hundreds of people and businesses who want to make a lasting difference in North East England. From poverty to education, the arts to the environment, health to housing, and much more, we embrace and enhance the work of charitable organisations making a contribution to the good of the North East.

Originally established in 1988, we are one of approximately 2,000 community foundations across the globe. We have a philanthropic endowment of around £100million and a growing family of approximately 300 funds started by people from all walks of life.

We exist to:

1.

Inspire philanthropy –

by being the region's go-to place for philanthropy, engaging more people and businesses in giving money, time and expertise, and using our knowledge to ensure current and future donors have the most impact.

2.

Invest in communities –

by harnessing more funding and support to have a long-term impact on the challenges facing our region's communities.

3.

Influence change –

by shining a light on our region's challenges and use our knowledge and networks to champion actions which better address them.



Get in touch

We would love to talk with you (and your advisor, too) to help you contribute to your region in a way that's best for you.

To do so, please email our Head of Giving and Philanthropy, Lisa Cappleman on lc@communityfoundation.org.uk.

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