



# Legacy Academy Series

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## Tax, Structures and Legacy Giving

This session will explore how high net worth clients value proactive advice on philanthropy and estate planning, covering legacy discussions, charitable giving structures in Wills, donor advised funds, tax benefits, recent regulatory changes, and practical tips for advisers.

### Key Facts:

- > There are generous tax incentives available for those who leave gifts to charity from their estate – donations to UK charities are tax-free and gifts of 10% or more of the net value can reduce the Inheritance Tax (IHT) rate from 40% to 36%
- > The changing fiscal environment around IHT makes it all the more relevant and important to talk to clients about these incentives
- > Legacy giving can be very flexible, with the opportunity for clients to support any UK charity, structuring donations as a fixed sum or residuary gift
- > In many cases, high net worth clients are incorporating charitable gifts through Will Trusts or using Donor Advised Funds
- > Wealth advisers are not expected to be philanthropy experts, but by getting the conversation started and working collaboratively with other specialists and charities, they can play a key role in helping clients achieve their philanthropic legacy



**James Cook**

**Partner, Russell Cooke LLP**

James works in estate and succession planning, wills, probate, trusts and more.



**Tatiana Watson**

**Senior Director,**

**Alvarez & Marsal Tax**

Tatiana looks after wealthy individuals and their families working closely with family offices, trustees and charitable foundations.



**Rachel Steeden**

**Head of Legal, Stewardship**

Rachel Steeden is an experienced private client lawyer now working in-house at Donor Advised Fund provider Stewardship

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