

ACKNOWLEDGING YOUR SUPPORT

We will acknowledge all benefactors by listing their names on our 'Memorial Wall' in the Museum. This acknowledgement will not, of course, disclose the size of your gift, though if you would prefer not to be named, or would like to dedicate your gift in memory of another, we will be happy to oblige.

MAKING A TAX-EFFECTIVE WILL

Bequests to charities such as The Bowes Museum are exempt from Inheritance Tax. If the value of your estate is over the Inheritance Tax threshold, it will be liable to the current rate of Inheritance Tax even if you have made a will. A gift to The Bowes Museum can lower that excess, which could reduce or even eliminate tax which might otherwise be payable out of your estate. Your solicitor or tax adviser will be able to explain this and provide advice on other legal and financial issues surrounding your estate.



Top left: Small 17th century picture in raised work embroidery in coloured silks, metal threads and sequins. Handwritten inscription on reverse 'Mary Lamberts Jnr. Gift of Mrs. V. Furness with two silver half pints Anno Dom 1678' .

A further inscription reads 'Stomp work picture bequeathed to me by my cousin, Margaret Jane Tarnowska (née Patterson) late of Portsmouth and West Auckland, Co. Durham – to be loaned by me in my lifetime and then given to The Bowes Museum, Barnard Castle'.

Presented to the Museum in 1992 by her cousin, Dolores Iceton, in memory of the Patterson and Iceton families of St Helen Auckland and West Auckland, Co. Durham.

Bottom left and right: Conservation of the 17th century embroidery by an HLF ICON Textiles Intern.



LEGACIES AND BEQUESTS
TO THE BOWES MUSEUM



“I am possessed of a large number of pictures, books, works of art, curiosities, antiquities and articles of furniture of great rarity and value, and I am desirous that the same should not be dispersed but should form one collection and should be placed in a museum and dedicated to the use of the public”

From Joséphine's Will, 1871

Whether a first-time visitor or a long-standing friend of The Bowes Museum it is likely that having experienced its magic, the Museum means something special to you.

Left as a gift to the nation, through the remarkable vision of John and Joséphine Bowes, the Museum has captured the imagination of visitors of all ages since 1892.

Legacies and bequests have enabled the staff and Trustees of The Bowes Museum to add to the collections, conserve works of art, and develop its galleries and facilities, ensuring that the Museum continually meets its charitable objectives of advancing the public’s understanding and enjoyment of arts, crafts, design and history. The Catalyst Endowment of £2M provides an annual income in perpetuity and it is our plan to grow this fund over the coming years. Leaving a legacy to the Endowment will secure the enjoyment of the Museum for future generations.

The Friends of The Bowes Museum has been a constant supporter of the Museum, generously donating significant sums to the Museum from its growing membership. If you would prefer to leave a legacy or bequest to the Friends, it is equally beneficial to us.

Front cover: Sir Anthony Van Dyck, (1599-1641), Portrait of Olivia, Mrs. Endymion Porter, Flemish School, c.1637; accepted in lieu of Inheritance Tax by HM Government from the Estate of The Duke of Northumberland and allocated to The Bowes Museum in 2015.

INCLUDING THE BOWES MUSEUM IN YOUR WILL

There are two ways in which you can benefit The Bowes Museum in your Will; by leaving a sum of money (legacy), or by leaving a specific item or items (a bequest). There are several kinds of legacy/bequest:

PECUNIARY LEGACY

This is an exact sum stated in your Will (eg. £1,000). Inflation will inevitably reduce the value of such a gift over time, so it is a good idea to review your pecuniary gift regularly.

Suggested wording for a gift:

“I give to The Bowes Museum, Barnard Castle, Co. Durham, DL12 8NP (Registered Charity Number 1079639) the sum of £..... for general purposes.”

RESIDUARY LEGACY

The residue is whatever is left from your estate when all other debts, tax (if any), expenses and the individual legacies of gifts have been paid. You can bequeath the entirety to The Bowes Museum or divide it among a number of beneficiaries. Residuary legacies are of particular benefit to The Bowes Museum, as the value of the gift will not be reduced by inflation over time.

Suggested wording for a gift:

“I give to The Bowes Museum, Barnard Castle, Co. Durham, DL12 8NP (Registered Charity Number 1079639)% of my residuary estate / all of the residue of my residuary estate to be used for The Bowes Museum for its general purposes.”



SPECIFIC BEQUEST

This can be a bequest of land, property and shares, or a gift of museum quality works of art such as furniture, jewellery, paintings etc. If you are considering gifting a work or works of art, we would encourage you to discuss it with us in advance, so that you are aware of how we may use your bequest. Where we cannot benefit from the gift directly – by acquisition to our own collections, for example – we may wish to benefit from its sale to a more fitting venue.

Suggested wording for a gift:

I give to The Bowes Museum, Barnard Castle, Co. Durham, DL12 8NP (Registered Charity Number 1079639) my (full description of item and its location).

REVERSIONARY BEQUEST

You can choose to leave assets to be used by a named beneficiary during their lifetime, after which the assets pass to The Bowes Museum.

CONDITIONAL BEQUEST

This allows The Bowes Museum to benefit from your estate should any or all of your named beneficiaries pre-decease you.

A GIFT FOR A SPECIFIC PURPOSE

If you wish to state the area you want to support with your gift, we suggest the following wording:

“I give to The Bowes Museum, Barnard Castle, Co. Durham, DL12 8NP (Registered Charity Number 1079639) [state the sum of money or the % residue] and request without obligation that it be used by The Bowes Museum in:

- Acquisition of objects for the permanent collections
- Education
- Conservation
- Exhibitions
- Building and Gardens Maintenance

NOTIFYING THE BOWES MUSEUM

We would find it very helpful to know if you have decided to include a legacy to The Bowes Museum in your Will. This will enable us to not only thank you for your generosity, but also to keep you up to date with our activities. You can notify us of your intentions by completing the reply form, or by asking your solicitor to contact us. Naturally, this is not legally binding, but simply an expression of your present intentions which helps us to plan for the future. It will, of course, be treated in the strictest confidence.

Title..... Name

Address.....

Telephone.....

Email.....

I have left a legacy to The Bowes Museum in my Will. This takes the form of

- ☐ The residue / a percentage of the residue of my estate
- ☐ A cash gift of
 - ☐ Up to £1,000
 - ☐ £1,000 - £5,000
 - ☐ £5,000 - £10,000
 - ☐ Over £10,000

This legacy is made

- ☐ to support the work of The Bowes Museum where it is needed most
 - ☐ to grow the Catalyst Endowment to provide a secure income in perpetuity
 - ☐ to support a particular area of work at The Bowes Museum (please specify)
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- ☐ I intend to leave a legacy / bequest to The Friends of The Bowes Museum in my Will.
- ☐ I intend to leave a bequest to The Bowes Museum in my Will and would like to discuss it with the appropriate Curator.
- ☐ I would like to arrange a visit to The Bowes Museum to see how my legacy could help. Please contact me to arrange this.
- ☐ Please contact me to discuss a legacy or bequest to The Bowes Museum.