Yma am *byth*
Here for *good*

Professional toolkit

This toolkit provides practical guidance for discussing legacy giving with clients, including conversation prompts, suggested wording and information on charities in Wales to support informed decisions and help ensure gifts reach their intended destination.



Conversation prompts

Legacy decisions can be complex, and small details can make a big difference. Starting the conversation early helps people make informed choices and ensure gifts intended for Wales reach the communities they want to support.

A simple way to open the conversation

"As part of your Will, some people like to include a charitable gift. Is that something you'd like to think about, and if so, would you like it to benefit a cause here in Wales or your local community?"

If the client says YES

"Is there a particular cause, community or organisation in Wales that means something to you?"

"Would you like this to support somewhere local to you, or Wales more broadly?"

"Have you already got a Will with a charitable gift in it? It might be worth checking the wording still reflects what you want."

If a client already has a Will

"When did you last review the charitable gifts in your Will? It's a good idea to check every few years that the wording still says what you intend, especially if you'd like it to benefit somewhere specific in Wales."

Example wording

Wording should always be finalised in line with your own firm's standard drafting practices. These are illustrative starting points, not approved legal templates.

General, broad wording:

"I give [amount/share] to charity for cancer research."

Clearer, specific wording:

"I give [amount/share] to Cancer Research Wales (registered charity number [XXXXXX]) of [address], for its general charitable purposes."

The same principle applies across causes:

Naming the exact registered charity, its registration number and its address removes ambiguity, particularly where a similarly named organisation exists elsewhere in the UK.

For clients who want their gift to stay broadly within Wales rather than naming one organisation:

"I give [amount/share] to be divided equally between charities registered in Wales and operating for the benefit of communities in Wales, as selected by my executors."

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Naming confusion to watch for

A short reference list worth having on hand when a client mentions a cause by a general name rather than a specific charity:

Cancer Research Wales is entirely separate from Cancer Research UK. A gift to one will not reach the other.

Wales Air Ambulance Charity operates independently from air ambulance charities in England and Scotland.

Cymru Football Foundation is the charitable foundation of the Football Association of Wales.

A client who wants to support their local community may not have a specific charity in mind. Organisations such as **Community Foundation Wales** can help direct funding to local causes and communities across Wales.



It's worth double-checking with the client which organisation they actually mean, rather than assuming the most well-known name is the right one.

About our founding partners



Community Foundation Wales

Turning philanthropy into impact for grassroots communities across Wales.

Sefydliad Cymunedol Cymru
Community Foundation Wales



Cymru Football Foundation

Bringing high-quality football facilities to within 15 minutes of every community across Cymru.

CYMRU FOOTBALL FOUNDATION



Wales Air Ambulance Charity

Wales's own emergency air ambulance service.

Elusen Ambiwlans Awyr CYMRU | WALES Air Ambulance Charity



Cancer Research Wales

An independent Welsh charity funding cancer research carried out in Wales.

ymchwil canser cymru
cancer research wales

One simple conversation can help turn intentions into lasting impact. For more information, visit yourlegacyforwales.co.uk.