

A Guide to leaving a lasting legacy for South Yorkshire



About this guide

A personal gift for a lasting impact. Tailored legacy giving to suit your story.

We understand that giving to charity is a deeply personal experience, and everyone is unique with specific needs. Whether you are honouring a loved one, looking to make a long term impact, or simply sharing what you can today, we are here to ensure your gift reflects your values. Your journey of generosity is yours alone, and we're honored to be a part of it.

This guide is designed to help you understand how leaving a gift in your Will to South Yorkshire's Community Foundation can make a lasting impact on the people and communities that matter most to you. It should serve as a conversation starter, so that you can take the next step towards giving with confidence and clarity.

We look forward to speaking with you and exploring how, together, we can make a lasting difference for South Yorkshire.



Why leave a gift to SYCF in your Will?

A gift in your Will allows you to provide for your family and loved ones first, while also ensuring a vital lifeline for South Yorkshire's most vulnerable and marginalised communities.

1 Support a charitable cause



South Yorkshire's Community Foundation work tirelessly to make a positive difference in our local area. We specialise in supporting smaller, local community groups organisations that act as a vital lifeline for the most vulnerable and marginalised people within our South Yorkshire communities.

2 A bespoke Legacy



Your gift to South Yorkshire's Community Foundation is entirely bespoke, ensuring your contribution is tailored to the causes that matter most to you. Whether supporting mental health, tackling poverty, or empowering the next generation, your gift creates a unique legacy that transforms local lives long into the future.

3 Leave your mark on South Yorkshire



Whatever the size of your donation, by remembering South Yorkshire's Community Foundation in your Will, you can ensure that our vital work lives on for years to come and that your memory does too. It is a powerful way to give back to the place where you lived, worked, and set down roots.

4 Be more tax efficient



Leaving a gift to South Yorkshire's Community Foundation, as with any charitable donation, is tax-exempt and, depending on size, can even reduce the inheritance tax you pay on your entire estate. Please consult your solicitor, visit gov.uk/inheritance-tax or HMRC to find out more about your options.



Did you know that 30% of all UK fundraising comes from legacy donations? This is a true testament to the amazing, longlasting impact this type of gift can have, ensuring a brighter future for our local communities across the region.



Why South Yorkshire?

South Yorkshire is a diverse region where unique and complex social challenges exist. We believe that communities often characterised as disadvantaged are actually rich with local ideas and untapped assets. Whether it's a youth project in Barnsley, an over-60s lunch club in Rotherham, or a dedicated support group in Doncaster or Sheffield, these small charities and grassroots organisations can make a life-changing difference to those who need it the most.

Why South Yorkshire's Community Foundation? Trusted to deliver since 1986

As South Yorkshire's largest local grant-giving charity, we have been passionate about empowering our region for 40 years. Since 1986, the Community Foundation has distributed over £40m to grassroots groups, providing a vital lifeline to thousands of essential community projects across Barnsley, Doncaster, Rotherham, and Sheffield. This remarkable legacy of connecting generous people and businesses with local causes ensures that our funding continues to make a lasting difference for the most vulnerable in our communities.

Our Vision

A South Yorkshire where positive action in communities drives change.

Our Mission

To enable South Yorkshire's communities to thrive through grant making and partnership.

Our Values

In everything we do, we promote inclusivity, honesty, transparency and fairness.

Your legacy in expert hands

Your generosity combined with the experience and knowledge of South Yorkshire's Community Foundation, and our connections to grassroots charities and organisations across the region will ensure your impact goes even further.

Benefits of giving through SYCF

1 The Power of Local Giving

We are the dedicated community foundation for South Yorkshire. Partnering with us, ensures your generosity stays right here in the region, providing a visible and lasting impact on your own doorstep. We champion small, grassroots organisations that have the trust and expertise to tackle the specific challenges facing South Yorkshire's communities.



3 Giving Made Simple

Enjoy the rewards of giving without the weight of administrative or reporting burdens. The process of building your legacy is made simple and stress-free. Our professional, bespoke services will help you reach your charitable goals, allowing you to focus on the joy of making a difference.



5 A Collaborative Partnership

Our high-quality philanthropic service complements support from your professional advisor. Collaborate with us to create a legacy reflecting your values and make a lasting difference in grassroots communities.



2 Efficient Fund Management

Establishing a personalised fund with SYCF is fast and efficient, avoiding the lengthy delays and complexities of registering an independent charitable trust. We take care of every detail, from initial due diligence and assessment to grant distribution and impact reporting, ensuring your legacy is managed with efficiency and precision.



4 Local Insight & Expertise

Benefit from our experience and insight into South Yorkshire's grassroots community sector. We can connect you and your loved ones to communities in need of support, providing knowledgeable guidance to enhance the impact of your legacy.



6 Tailored Flexibility

You and your family have the freedom to support a diverse range of local causes, ensuring your fund creates the exact impact you envision. We offer the flexibility you need to align your legacy with the causes that matter most to you, all in one place.

How to give

Leaving a Legacy

Leaving a gift in your Will to South Yorkshire's Community Foundation helps to create a positive long-lasting difference in your community for generations to come.

Types of Legacy



Pecuniary Legacy is a fixed amount specified in your Will. It is free of tax, which adds considerably to the value of your gift.

A Residuary Legacy is the remaining value of your estate after all other bequests to family and friends have been made.

A Reversionary Legacy allows family and friends to benefit from your estate during their lifetime and then for the balance of the estate to pass to the Community Foundation.

Specific a particular item, such as shares, property or valuables, left to the Foundation will be free of inheritance tax

Add SYCF to your Will

To include us in your plans, please provide your solicitor with our name and charity number (1140947). We recommend consulting a professional to ensure your Will is robust and your wishes are protected. To find a South Yorkshire solicitor, you can contact The Law Society at 020 7242 1222 or visit their website.



Prioritise your loved ones

We understand that your loved ones come first. Once you have provided for them, even a small gesture—such as leaving just 1% of your estate to South Yorkshire's Community Foundation—can make a substantial difference in shaping a better future for our region. We also welcome the involvement of your family in how your legacy is managed, allowing them to see firsthand how your gift supports those most in need across Barnsley, Doncaster, Rotherham, and Sheffield.

Decide how your gift helps South Yorkshire

You can choose to support specific local causes or organisations, or you can entrust your gift to the Foundation's general funds to meet the most urgent needs of the region as they arise. If you have specific intentions for your legacy, we encourage you to speak with our Philanthropy Team. We are here to ensure your gift is directed exactly where you want it to make the most impact.



Legacy donor spotlight

David has been a dedicated supporter of South Yorkshire's Community Foundation (SYCF) since 2017. Having spent his life living and working in the region, he founded his business, Price Express Transport Limited, in 1979. What started as a modest operation from his parents' home grew into a successful national logistics company.

After selling the business in 2015, David wanted to give back to the place that shaped his success. By establishing The David Price Charitable Fund, he was able to take advantage of an Endowment Match Challenge, doubling his impact to support local causes.

David also made the strategic decision to boost his charitable fund by leaving a gift in his Will. For David, this was not only a way to ensure his commitment to South Yorkshire continues indefinitely but also a tax-efficient way to manage his estate.

Through SYCF David's legacy will ensure that the communities of South Yorkshire remain supported, vibrant, and connected for generations to come.

"I wanted to make a charitable contribution to the region, and South Yorkshire's Community Foundation enabled me to do just that. I can support local charities that meet my interests, such as helping young people into work and education, or projects that reduce social isolation for older people. After selling Price Transport in 2015 I wanted to make a charitable contribution to the region. South Yorkshire's Community Foundation have enabled me to do just that."

David Price



A comparison between a Personal Fund at SYCF and a Charitable Trust

Start Up	SYCF Fund	Charitable Fund
Costs	1-15% depending on the type of fund set-up	Possible legal fees for registration
Donor control	Trustees of SYCF take on the legal and fiscal responsibility for the donor's fund, while the donor recommends grants to the organisations vetted by SYCF	Donor appoints Board of Trustees to control all aspects of grant-making and investment
Geography	SYCF operates in South Yorkshire but partner with other UK Community Foundations on delivery of national or regional initiatives	Donor/trustees determine their geographic reach
Grant-making service	Professional staff available to help, identify and assess grantees, provide input on community needs and ensure follow up with recipients and report back to the donor	Donor appoints Board of Trustees to control all aspects of grant-making and investment
Philanthropy advice	SYCF provides full service advice to donors.	Donor/Trustees responsible for own giving
Privacy	SYCF can maintain the anonymity of any Donor	The Charitable Trust must keep public records
Procedure	Simple agreement.	Must apply to Charity Commission and register. Must appoint a board of trustees.
Profile	SYCF can help the donor as much or as Responsible for own profile. little as they want.	Responsible for own profile
Reach	SYCF connects donors to a variety of groups and issues in the community and connects like minded donors	Must find own networks and information sources
Reporting to authorities	SYCF takes care of reporting to the Charity Commission, particularly the Annual Reports and Accounts	The donor/trustees must maintain all financial records, prepare accounts and submit to the Charity Commission
Tax status	Covered under SYCF's charity status	Covered by registration with the Charity Commission
Timeframe	Immediate	May take weeks/months

Find out more:

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South
Yorkshire's
Community
Foundation

40
Celebrating
40 years of giving