

# GIFT IN WILLS



**THEATRE**  
**BY THE LAKE**

# LEAVING A GIFT TO THEATRE BY THE LAKE

By leaving Theatre by the Lake a gift in your Will, you will ensure we remain a place for connection, expression, and community. A place for creatives to develop and young people to engage.

A place for original Cumbrian storytelling, classic productions, and accessible theatre for all.

A place for excited children seeing their first ever show and theatre veterans who have visited us for decades.

A place where **Steel** was created, where **Every Brilliant Thing** was developed, and where audiences can be challenged, informed, and entertained.

A place of natural beauty and serenity, where everyone is welcome.



# WHAT WE STAND FOR

## Our VISION

Theatre enriches the lives of everyone in Cumbria, and theatre made in Cumbria is celebrated on the national stage.

## Our MISSION

In our venue and out across Cumbria, we make and share great theatre that tells stories, builds communities and celebrates our place.

# WHAT YOUR GIFT WILL SUPPORT

**Any gift Theatre by the Lake receives, no matter the size, makes a vital contribution to our ongoing work.**

By choosing to leave an 'unrestricted' gift, you will enable us to use your donation wherever the need is greatest. Whilst you are welcome to leave a gift for a specific area of our work, we encourage you to include the words 'general purposes' to allow us to adapt should a project no longer be running.

**Our promise to you is that your gift will help us make and share great theatre that tells stories, builds communities and celebrates our place, right here in Cumbria.**





# HOW TO INCLUDE A GIFT TO US

All legacy gifts to the Theatre by the Lake should be directed to Cumbria Theatre Trust (Charity number 516673). Though our supporters know us through our trading name, 'Theatre by the Lake', our registered charity name is Cumbria Theatre Trust.

By leaving a gift in your Will to a charity, your gift will be exempt from Inheritance Tax. If you decide to leave at least 10% of your estate to charity, the Inheritance Tax rate on the rest of your estate may reduce from 40% to 36%.

## WHO TO SPEAK WITH

We recommend that you seek advice from your financial or legal adviser. Should you decide to make a gift to the Theatre by The lake, you can choose to leave either a share of the residue of your estate (a residuary bequest) or a fixed amount (a pecuniary bequest).

## SUGGEST WORDING

### Residuary bequest

I/We give all/a share of [please state fraction/ percentage] of the residue of our/my estate to Cumbria Theatre Trust, Theatre by the Lake, Lake Road, Keswick, CA12 5DJ. Registered Charity Number 516673, to be applied for the general purposes of Theatre by the Lake, and I/we direct that the receipt of a proper officer for the time being of Theatre by the Lake shall be a complete discharge to my/our Executors.

### Pecuniary bequest

I/We give to Cumbria Theatre Trust, Theatre by the Lake, Lake Road, Keswick, CA12 5DJ. Registered Charity Number 516673, to be applied for the general purposes of Theatre by the Lake, the sum of [amount in figures, amount in words] and I/we direct that the receipt of a proper officer for the time being of Theatre by the Lake shall be a complete discharge to my/our Executors.

# ENSURE THEATRE IN CUMBRIA FOR GENERATIONS TO COME

Those who have chosen to notify us that they have pledged to leave a legacy gift to the Theatre by the Lake will receive a small token of appreciation. Needless to say, we would love the opportunity to thank you, so please do inform us if you're comfortable in doing so.

Please note, you are under no obligation to inform us of your situation, however, if your circumstances change, we would appreciate if you let us know so we can update our records.



To find out more about remembering Theatre by the Lake in your Will please contact **Sam Meegan** on **01768 206074**, or **[sam.meegan@theatrebythelake.com](mailto:sam.meegan@theatrebythelake.com)**.

All conversations will be treated discreetly and in confidence.

**THEATRE  
BY  
THE LAKE**