

Western
Locomotive
Association



A Legacy Guide

*How you can help future generations enjoy the
sight & sound of Westerns...*

....and how you can have your very own

WESTERN MEMORIAL!



Leaving a legacy to the Western Locomotive Association

The WLA was one of the first preservation groups to purchase a mainline locomotive in the UK and this was successfully achieved in October 1976, with the purchase of D1062 *Western Courier* before the remaining members of the class were withdrawn. The WLA was also given the responsibility of looking after D1013 *Western Ranger* from 1977, which was privately owned until purchased by the WLA in August 2004. More recently, the WLA were honoured with the gift of D1048 *Western Lady* in October 2023.

Thanks to the help and support from the WLA Members and all those who have helped the WLA over the years, the WLA has managed to keep the sight and sound of at least one working Western every year, for nearly half a century! Who would have thought that would be possible back in 1977, when the last of the class were making their final trips on British Rail?

Without doubt, none of the above could have been achieved without the generous contributions made by individuals over the years. This has included both donations and legacies which have enabled the WLA to maintain and operate its locomotives to such high standards, at least to the equivalent of what would have been expected in BR days.

The purpose of this Guide is to provide suitable wording for those Western/Thousand/Class 52 enthusiasts who wish to make a bequest. It is important that the correct wording is used to prevent the whole legacy from being invalidated. Making a bequest in a Will is a tax efficient method of giving, as it is free of inheritance tax and can greatly benefit the process of estate planning. There are several ways in which a legacy donation can be made, and the following are examples of the wording that could be used:



General Purposes Requests – Example wording:

Residuary gift

Subject to the payment of my debts, funeral and testamentary expenses, I give the whole / _ % of my estate not otherwise disposed of by this my Will to The Western Locomotive Association Ltd (WLA) of 5, Prospect Place, Millennium Way, Pride Park, Derby, England DE24 8HG, a Registered Charity No. 1115058, for the general purposes of the WLA and I declare that the receipt of its Treasurer or other proper officer shall be a full and sufficient discharge.

Pecuniary gift

I give free of tax to the Western Locomotive Association Ltd (WLA) of 5, Prospect Place, Millennium Way, Pride Park, Derby, England DE24 8HG, a Registered Charity No. 1115058, the sum of £__ for the general purposes of the WLA and I declare that the receipt of its Treasurer or other proper officer shall be a full and sufficient discharge.

Requests of a Specific Item or Collection – Example wording:

I give free of tax to the Western Locomotive Association Ltd (WLA) of 5, Prospect Place, Millennium Way, Pride Park, Derby, England DE24 8HG, a Registered Charity No. 1115058, the.....(insert specific items) and I declare that the receipt of its Treasurer or other proper officer shall be a full and sufficient discharge.

NB. In such instances there may be a cost involved in transporting item(s) in question to the Severn Valley Railway, where the WLA is based and it is suggested that additional wording is added:

‘and I authorise my Executors to pay the expenses of transporting the said..... (insert specific items) to the Severn Valley Railway from my estate.’

Additional wording to be considered

‘If at my death the above charity has amalgamated with another charity, my Executors shall pay its share to the amalgamated charity.’



How you can have your very own WESTERN MEMORIAL

For any legacy left to the WLA you can choose how you would like to be remembered! This might be from one (or more) of the following:

- 1) A private Obbo attached to a WLA Western hauled train for friends and family on a suitable operating day
- 2) A memorial wreath added to a WLA Western locomotive operating on the SVR on a suitable operating day
- 3) A special headboard and wreath added to WLA Western locomotive operating on the SVR on a suitable operating day

Please state which of the above you would prefer in your Will and please state: 'and I authorise my Executors to pay the expenses of



And finally...

Please remember that your gift will help keep our Westerns running for future generations to enjoy! Thank you!

NB Please note that we strongly advise that you to consult your legal advisor before drafting a new Will, or updating an existing one.