



What is a charitable trust?

Charitable trusts are your route to making an impact.

From funding your favourite theatre to safeguarding your local schools to supporting global climate change initiatives – and everything in between. However niche or broad the cause, well invested wealth can help make a difference.

In setting up a charitable trust with Ludlow Trust Company, you will have the power to shape the trust's grant-making strategy with the help of our highly qualified experts.

A charitable trust is a charity registered with the Charity Commission in England & Wales or with OSCR in Scotland.

Is a charitable trust right for me?

If you want to make a difference, a charitable trust is a great way to do it.

Whether you are looking to set aside a few hundred thousand pounds or multi-millions, up front or over time.

Your experience of opening and operating a charitable trust can be as hands on or hands off as you wish. We will handle all the administration leaving you to focus your time on the important things; what you want to give and who will benefit.

Already have a charitable trust and need some help?

As well as helping our clients set up trusts from scratch, our experienced team can provide services to both new and existing trusts. For an existing trust we can act as the postbox for your trust, receiving and processing applications, and doing due diligence on the recipients.



Why set up a charitable trust?

Leaving a legacy

Charitable trusts are a great way to create and leave a lasting legacy, allowing you to support causes close to your heart. They can be created at any time and forming a trust now allows you to decide how it runs and have the ability to build and scale it as you wish. With our experience, we have the tools and expertise to work with you to craft a charitable trust which is unique to you and delivers on your philanthropic vision.

Engaging the next generation

Starting a charitable trust is a great way to get the future generations involved and engaged with the worlds of charitable giving as well as assets and investments. Older children can learn important lessons about investing through observing how a

charitable trust is run and helping manage it, while young children can start to understand how family wealth can be used to help others. Consider the long-term value of engaging with your family in deciding which charitable causes to benefit.

Very compelling tax reliefs

Charitable trusts benefit from exceptionally compelling tax reliefs. For an additional rate taxpayer, the cost of setting up a new charity may be about half of the total value of the trust – in practice this means a £500,000 trust only costs £265,000, using Gift Aid. These benefits also extend to giving via your will, where a gift of 10% of your estate to charity could end up only costing your family around 2.5%. We can also help non-domiciled clients looking to set up a UK charity.

Charitable incorporated organisation (CIO)

If you are interested in establishing a CIO rather than a trust, our team can advise and guide you through the process. Book a meeting to find out more.

Grant making foundation

A grant making foundation is the umbrella term for charitable trusts and charitable incorporated organisations which make charitable grants to others. Our team can help you get to grips with any type of grant making foundation. Book a meeting today to get started.

Need our help?

You can get in touch by calling us on 020 4534 2750, emailing us at enquiries@ludlowtrust.com or completing the form on our [Contact page](#).

You can view our [Services Terms & Conditions](#) on our website.

This information sheet is written as a general guide and the law is stated as at 5 January 2023. You must seek independent advice to satisfy yourself of any tax or legal or other consequences in connection with the establishment of a charitable trust.