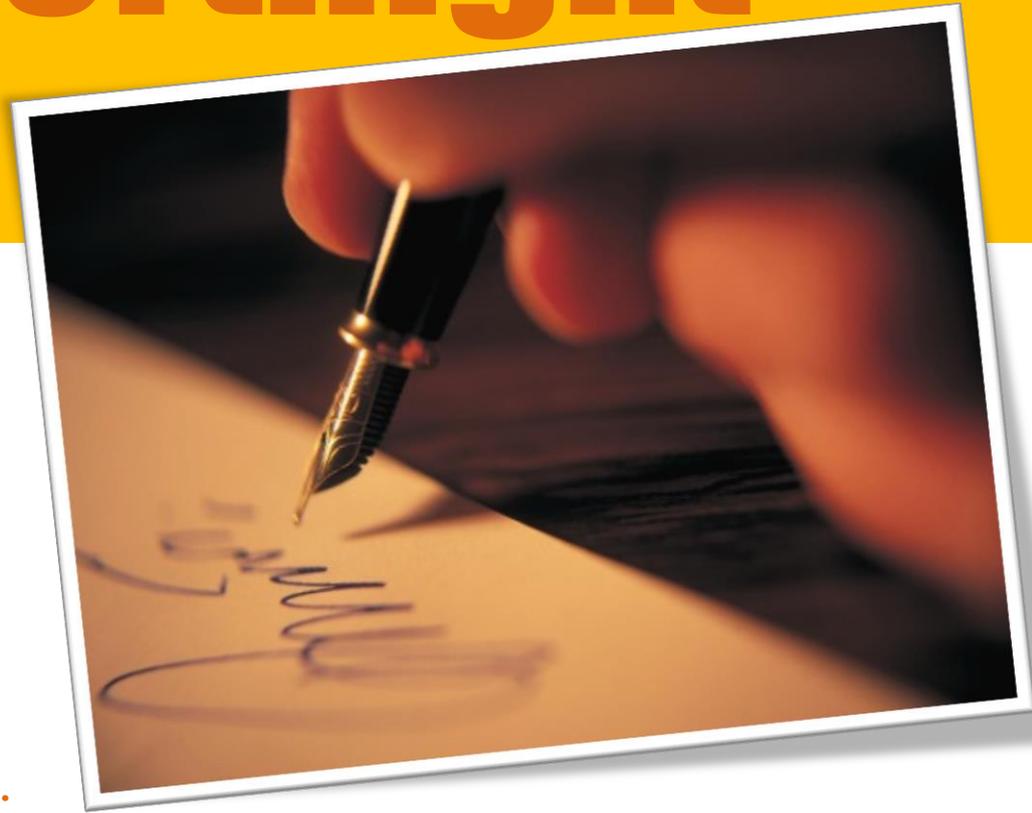


# Make a Will Fortnight

**10 - 21 October 2016**

100% of your donation  
will come to the Dudley  
Group NHS Charity



This leaflet includes . . .

- Why make a Will?
- Participating Solicitors
- Frequently asked questions
- A guide to making a will and leaving a legacy



Charity Number: 1056979

Giving you peace of mind  
and helping a good cause

Making a Will is simple and an important way to protect the future of your loved ones. It's the only way to be certain that your money and your belongings go to the people and causes you care about.



## Why should I make a will?

You may have put off making a will because it involves thinking about what happens when you're no longer here. This is understandable but it also leaves the door open for your loved ones to miss out and for the Government to benefit from your property and your possessions.

Making a will gives you peace of mind that your property, possessions and money will go to the people and the organisations you care about. No-one can control when the inevitable will happen but you can maintain control of what happens when it does.

## Won't everything go to my next of kin if I don't have a will?

This is a common misconception. Sometimes this will happen but not always. If you don't have a will, the law dictates who gets what. For example, if you are not married to your partner regardless of how long you have lived together, your partner would receive nothing. If you have no living relatives, everything you own goes to the Government.

## Why Now?

Waldrons Solicitors are supporting DGNHS Charity by offering their time to prepare a standard will for our patients, staff and supporters completely free of charge in exchange for a donation which will help us give extra support to patients and their families.

The suggested donation is £80 if you are a single person or £150 if you and your partner make wills at the same time. This is a saving of over 50% on the usual charges and 100% of your donation will go to supporting Dudley Group NHS Charity. If your will is not standard, for example if you need Inheritance Tax advice or if you need to set up Trusts, Waldrons will explain and agree any charges with you in advance.

**You will receive exactly the same service as you would if you were paying the usual cost of a will, as well as the benefits that Waldrons' clients receive. Please see next page for further information.**

# Making your appointment

Please contact Sarah Jukes-Austin of Waldrons on 01384 811 811 or by email to [S.Jukes@waldrons.co.uk](mailto:S.Jukes@waldrons.co.uk) to arrange a meeting with one of Waldrons' specialist will solicitors to take place between 10<sup>th</sup> and 21<sup>st</sup> October 2016.

**Please ensure you mention DGNHS Charity Will Fortnight when you call or email.**



Offices at : Dudley, Kingswinford, Merry Hill and Walsall

[www.waldrons.co.uk](http://www.waldrons.co.uk)

☎ 01384 811811

## Meet Waldrons' Specialist Will Solicitors



Tracey Emonson, Dawn Cash, David Edge and Claire Elliott

Waldrons give their time free of charge but you will receive exactly the same service that you would receive if you were paying Waldrons to prepare your will. As you will be a Waldrons' client, you will automatically receive the following benefits:

- A no cost review of your will every five years
- Guaranteed secure storage of your will, completely free of charge
- Waldrons' Lawcard which entitles you to benefits on legal services including reduced costs of Powers of Attorney, 24/7 Motoring Law Helpline and £30 vouchers every time you recommend friends or family to use Waldrons' property specialists when moving home.

## Remember . . .

DGNHS Charity will receive 100% of all donations and by making the suggested donation you will be saving at least 50% on Waldron's usual charges for preparing a will.

# Frequently Asked Questions

## 1. Why should I make a Will?

It's the only way to be certain that your money, property and possessions will go to the people and organisations you care about.

Everyone should have a will but it is particularly important if:

- you have a partner who you are not married to - the law says that they are entitled to nothing if you don't have a will that leaves something to them
- you are separated - your spouse may benefit from your property, money or belongings if you don't have a will to exclude them
- you want to leave gifts to charity or to friends - the law won't allow this if you don't have a will

**No-one has control over when the inevitable will happen but making a will gives you the ability to control what happens when it does.**

## 2. When do I need to make a Will?

If you don't have a will, the simple answer is now. You are never too young or too old to make a will and have the peace of mind that having a will gives to you and your loved ones.

## 3. What is a standard Will and is it right for me?

A standard will is ideal for you if you are leaving your property and possessions to family members, friends or if you plan to leave gifts to charity. If you have children who are under 18, it also includes appointing guardians for them. A standard will would not include Inheritance Tax planning or setting up Trusts for anyone other than children under the age of 18.

## 4. What will it cost me?

You will be given an envelope in which to place your donation to DGNHS Charity. The suggested donation is £80 if you are a single person or £150 if you are a couple making a will at the same time. This is less than half the cost of making a will if your solicitor charged you for it. If your solicitor thinks you may need Inheritance Tax advice or if you need to set up Trusts, the cost of doing this will be discussed with you in advance.

If you sign the Gift Aid declaration on the envelope, we can also claim back a further 25% from the tax man.

## 5. How do I get in contact with the Solicitor?

Call Sarah Jukes-Austin of Waldrons, on 01384 811 811 or email Sarah at [S.Jukes@waldrons.co.uk](mailto:S.Jukes@waldrons.co.uk). Please remember to mention the DGNHS Charity Will Fortnight when contacting Waldrons.



# Legacies & Wills

A guide to making a Will and leaving a legacy to charity

When you have thought about your loved ones in your Will, you may wish to donate to a charity. This guide explains how you can leave a bequest or legacy to the Dudley Group NHS Charity.

## Why the Dudley Group NHS Charity needs your legacy

Money donated to the Dudley Group NHS Charity adds extra value to the already excellent care offered by the NHS. It enables us to buy new medical equipment, provide specialist training for staff and improve patient comfort and care.

Your gift to us will help us to continue offering extra support and comfort to our patients, enabling our patients to have the very best experience possible.

To find out more about our charity you can find details at the bottom of this brochure.

A legacy is a gift for the future and can make an enormous difference to our charity. You can specify a particular area to donate to or place it in our general fund which is governed by a charity committee. We can make sure your legacy goes to a deserving department or ward in accordance with your wishes.



# Making Your Will



**Everyone needs a Will. It is the only way of making sure that your property and possessions go to the people you care about when you are no longer here. Your Will can spare additional distress to your family and friends and can stop legal wrangling following your death.**

Sometimes people assume that everything they own will automatically pass to their next of kin. The fact is that, without a Will, the Government decides who should have everything you own (legally known as your Estate) and it can even become the property of the Government. This could mean that your family and friends receive nothing.

Planning for the future is a very personal process for you and for your family. It involves looking closely at the things you believe in, how you feel about your family's inheritance and how you want to be remembered by society.

## How does this work?

When you contact Waldrons, a meeting will be arranged with an expert solicitor and you will be sent a Will Questionnaire which will contain some of the things that you need to think about. This will help to focus the meeting on who should receive what in your Will.

## Cash gifts

You can decide to leave a set amount of cash to a person, an organisation or charity.

## Specific items

If you have specific things you want to leave such as items of jewellery then you will need to be as descriptive as you can about what that item looks like. If you are not descriptive enough about the item then it may be that the item cannot be identified. You can leave specific items to someone or to charity.

## Everything else: The Residue

After you have decided on any specific cash gifts and specific items, and when any liabilities are paid, everything else that is left is called 'the residue'. You will need to decide who receives this and if more than one person, how it is to be divided. You can leave the residue to one person, several people or to charity if you wish.

## Who makes sure my wishes are followed?

When you make your Will, you will need to choose people to deal with your Will following your death. These people are known as Executors. You can appoint between one and four Executors but it is always recommended that you have at least two. You can appoint your solicitor as your Executor but they will charge for their services and the charges would be payable from any money or property you leave in your Will.





There are a number of ways you can leave a legacy to Charity.

### Specific Cash Gifts

You can leave a fixed amount of money to charity. It is simple and straightforward. If you would like to leave a cash gift to help our work, please ask your solicitor to include it in your Will.

### Specific Legacy

A specific legacy enables you to leave something of value to the Dudley Group NHS Charity, which can be used by the charity appropriately. These can be items of jewellery, property, shares or furniture. It must be clearly identified in your Will.

### Residuary Legacy

A residuary legacy is when you leave the balance of your estate to the Dudley Group NHS Charity after everything else is taken care of e.g. debts, liabilities and tax.

You can specify a particular area to donate to or place it in our general fund which is governed by a charity committee. We can make sure your legacy goes to a deserving department or ward in accordance with your wishes.

Please Note: We are not able to advise further on legal matters relating to the leaving of a legacy as such other advice should come from an independent solicitor or other professional adviser.

For more information contact Karen Phillips, Fundraising Manager on: 01384 456111 ext 3349 or [karen.phillips@dgh.nhs.uk](mailto:karen.phillips@dgh.nhs.uk)



## Dudley Group NHS Charity

2<sup>nd</sup> Floor, Trust HQ, Russells Hall Hospital, Dudley, DY1 2HQ

Charity Number : 1056979

[www.dudleygroup.nhs.uk/our-charity](http://www.dudleygroup.nhs.uk/our-charity)



@DGNHSCharity



/DudleyGroupNHSCharity