



Gifts in Wills at Hft



Thank you for considering to include a gift in your Will to Hft, I hope this guide gives you all the information you need to make your decision.

Thanks to people like you, Hft has transformed from a single home for six young people to a nationwide organisation which supports over 2,500 people – all in the past 60 years. We're enormously proud of the lives we've already changed, and are committed to ensuring that we can change many more for another 60 years and beyond.

It's our hope that in the future, people with learning disabilities will be able to live as independently with as much choice and freedom in their lives as possible. That challenge is ongoing, and never likely to change in the face of shrinking statutory funding. Gifts in Wills, no matter how small, can help secure this future – meaning we can always deliver outstanding care, wherever the need is greatest.

These gifts help us to ensure that we can always put the needs of the people we support first. You'll never stop caring, and neither will we.

On behalf of everyone at Hft, thank you for considering supporting us in such an important and thoughtful way.

A handwritten signature in black ink that reads "K. Matthews". The signature is written in a cursive, flowing style.

Kirsty Matthews
Chief Executive

Why do you need a Will?

Your Will tells everyone what should happen to your estate (money, possessions and property) after you die. The thought of making a Will can make many people feel uncomfortable, but sadly if you don't leave a Will, the law decides how your estate is passed on – and this might not be in line with your wishes.

A Will makes it much easier for your family or friends to sort everything out when you die – without a Will the process can be more time consuming and stressful for them. Most importantly, a Will ensures by law that you can look after those closest to you.

Writing a Will is especially important if you have children or other family who depend on you financially, or if you want to leave something to people outside your immediate family. A Will can help reduce the amount of Inheritance Tax that might be payable on the value of the property and money you leave behind.

Remember that your Will can always be updated at any point if your circumstances change. Only the most recent updated Will is valid.



How do you make your Will?

You should always meet with a solicitor or professional Will-writer to formalise your Will, but here are some steps you can make before you meet them.

1

What do you have?

Calculate all of the money, possessions and property that you own which makes up your estate. This includes items such as jewellery, the contents of your home or shares/investments.

You would also need to deduct any debts such as mortgages.

2

Decide how to divide your estate

You need to decide who you want to get what. If you wish to make a gift to friends or family, remember to include their full names and addresses. There are 3 types of gift you could leave:

- You could make a **pecuniary** gift, which is a fixed amount such as £5,000.
- You could leave a **residuary** gift, which is typically a percentage or share of your estate, for example 100% of your estate divided equally between your two children.
- Finally you could leave a **specific** gift, such as a car or an antique.

For a gift to Hft, no matter how small, make sure that you use our name, registered address and charity number.

3

Put someone in charge

You will need to decide who to carry out the wishes of your Will when you die. If you would like this to be a friend or family member, make sure you talk to them about it first. You don't need to tell explain how you have divided your estate to them if you don't want to, but just to inform them of the responsibility they have when they time comes. This person can also be your solicitor.

4

Consult a professional

It's now time to meet with your solicitor or Will writer. They will help you make sure everything is recorded correctly.

Depending on the complexity of your estate and your wishes – a Will can have different costs. A specialist Will that involves trusts or oversea properties, or perhaps you want tax planning advice, could cost double or triple the costs of a simple Will.

5

It's done!

You can feel safe in the knowledge that your Will is now formalised, and that your loved ones are now protected. Do remember that your Will can be updated at any time that you feel like it.

How to leave your gift to Hft

We fully appreciate that many people, particularly the families of the people we support, will want to leave a gift in their Will to directly benefit one of our services. This is entirely your decision however it is very important that these requests are if possible stated as a preference or as we refer to it a wish and not a conditional gift. A general gift to Hft (unrestricted) means the charity can choose that your gift is spent where the need is greatest across any of our services.

Conditional gifts may prevent Hft from receiving your gift in the future if a particular service or house should cease to exist for any reason. This could mean that your gift may not be received by Hft.

Example of conditional wording which could mean your gift is not received by Hft:



I bequeath 15% of my residual estate to Home Farm Trust of Sheffield whose registered charity number is 313069 to be used for the benefit of House 10

Example of recommended wording with wish to benefit an Hft Service:



I bequeath 15% of my residual estate to HF Trust Ltd, registered charity number 313069, of 5/6 Brook Office Park, Folly Brook Road, Emersons Green, Bristol, BS16 7FL, with the wish that it may be used for the benefit of its work at Hft Sheffield and the people supported at House 10

Important information which will need to be included in your Will when leaving a gift to Hft:

Registered Charity Name: **HF Trust Ltd**

Registered Charity Number: **313069**

Registered Address: **5/6 Brook Office Park, Folly Brook Road, Emersons Green, Bristol BS16 7FL**

If you have any questions at all, you can contact our Gifts in Wills team on:

0117 906 1699

or email

giftsinwills@hft.org.uk

We're always happy to help where we can.

Glossary

Beneficiary: An individual or organisation who will receive a gift in your Will.

Bequest: Money or an item that is left in a Will.

Estate: All your possessions at the time of your death, including money and property. This also includes any liabilities such as a loan.

Executor: The person who is appointed by you to make sure the instructions in your Will are carried out.

Index-linked pecuniary legacy: A cash gift which can be linked to the index of retail prices, allowing amounts pledged now to keep their value in line with inflation.

Inheritance Tax (IHT): A tax only payable if your estate is worth more than £325,000. Reducing the estate value with a donation to charity can reduce Inheritance Tax.

Intestate and intestacy: A person is said to be intestate if he/she dies without making a Will.

Legacy: A legacy is a gift left to a person or organisation in your Will.

Pecuniary legacy: A gift of a fixed amount of money.

Power of attorney: A legal document which authorises one or more people to handle another person's financial affairs (including property, shares, money, etc), either generally or in relation to specific items.

Probate: The legal procedure by which your executor is given the authority to administer your estate. The remainder of an estate after the deduction of tax, debts, specific gifts, legacies and the expenses of administration.

Residuary gift: A gift of residue made in a Will. This is a particularly popular way to leave a gift to a charity.

Specific gift: A gift of a particular item, for example a piece of jewellery or furniture.

Testator or testatrix: The person making the Will.

Will: A Will is a legal document containing instructions for your executors on what will be done with your money and property after your death.

Witness: Someone who signs your Will in your presence, who must not be a beneficiary.

Contact us

If you are including a gift to Hft in your Will, please do let us know so we have the chance to thank you in your lifetime.

Sharing your decision with us can help us to plan for years to come – even if circumstances mean you're unable to leave us that gift in the future.

It lets us know that you're thinking of us, and that you believe in the impact we're making every day to those with a learning disability, and that you have faith in the future we want to create for people.

Simply cut or tear off this page, and send it in the post to:

Gifts in Wills Team (Fundraising)

Hft

5/6 Brook Office Park

Folly Brook Road

Emersons Green

Bristol

BS16 7FL

Alternatively you can call the team on **0117 906 1699** or email **giftsinwills@hft.org.uk**. We're always happy to help where we can.

We never need to know how much you are considering leaving, but we want the opportunity to thank you in your lifetime for trusting Hft with this last and very special gesture of support. We would also like to update you on how Gifts in Wills are making a significant difference to the people we support every day. Please tick the box relevant to you, tear off the slip and send back in the envelope provided.

Any information you provide will remain confidential.

- I'm **considering** leaving a Gift in my Will to Hft
- I'm **intending** leaving a Gift in my Will to Hft
- I've **pledged** a Gift in my Will to Hft
- Please don't contact me about Gifts in Wills



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Staying in touch

Being able to communicate with amazing supporters like you, helps us do more for the people we support by sharing stories, raising awareness and vital funds.

We'd love to tell you how you're making a difference as well as events, volunteering and fundraising opportunities you might be interested in. Please let us know how you'd like to be contacted.

Yes, please contact me via: Email Phone SMS/Text

We might send you news, updates and marketing through the post, if you would prefer NOT to receive anything via post, please tick here

Title / Full Name (inc. Surname): _____

Address: _____

Postcode: _____

Telephone: _____

Email: _____

**Why do you want to leave a gift to Hft?
Tell us your story here...**

