
Leave a Lasting Legacy

A Guide to Leaving
a Gift or Legacy
in your Will





Our mission is to help older people 'age well' in Wandsworth

Age UK Wandsworth is an independent, local charity that has been working with older people in Wandsworth since 1963. Whilst we partner with Age UK, we are a separate charity. The vast majority of our funding is raised in Wandsworth and all of it is spent in Wandsworth.

We offer a number of services that aim to support older people to stay living independently for as long as they wish to do so. Our vision is that everyone should be able to 'Age Well in Wandsworth'.

In 2019, we supported over 8,370 people with 370 volunteers and 17 (mostly part-time) staff. In 2020, the focus of the organisation shifted rapidly due to the Coronavirus and by June the organisation had already provided food parcels to over 3,500 isolated, older people in Wandsworth. If you would like to read more about our services, you can find further information online or alternatively pick up a brochure from the office.

We hope this brochure brings to life the value of the work we do and the impact on the lives of older people in our community of Wandsworth.





Remember Us in Your Will

The generosity of gifts we receive in Wills is significant in helping us continue our work in the local community. If you decide to leave a gift in your will to us, you will be supporting us to make life better for older people in Wandsworth.

**Together, we
can help
Wandsworth
age well.**

How You Can Help Us

Every single gift is important to us. We, and the people we help, appreciate any gift you may choose to make, no matter the value.

By leaving a gift to Age UK Wandsworth, you could help us combat social isolation in the community and fund the various services that offer support, our befriending service, online food shopping service and hospital discharge service, to name a few.

You can leave a lasting legacy by helping to be a part of the notable work we do in the community, whilst helping support future generations in your local area. Together, we can help Wandsworth age well.

After setting out your wishes to take care of family and friends, you can also choose to give back to the community by leaving a gift to Age UK Wandsworth and/or other organisations important to you. Every gift, no matter how big or small, has the power to make a real and lasting difference to the older community in Wandsworth.

Leaving a gift to charity in your Will can reduce the amount your estate pays in inheritance tax. This means that you can make an even greater difference to your loved ones and the causes you care about. Some people see it as a useful way of bringing their estate under the inheritance tax threshold. Your solicitor can advise you about the current threshold.



Family Can Still Come First

"Of course I want to look after my family, but I also want my legacy to allow other people to get the same support from Age UK Wandsworth as I have. I take comfort from knowing I will be helping people stay living independently as I have - that's what we all want really, isn't it? To stay living at home."

- Mrs M, Tooting



Make a Lasting Difference

One of our former service users, John Laverick, left a very generous legacy in his Will to Age UK Wandsworth. John's gift has supported a much-needed information and advice service, and enabled us to provide information to 165 older people in Wandsworth in 2019.



In 2020, we anticipate that his donation will allow us to provide information to a further 600 people, and in-depth advice and support to a further 100 older people on a wide range of issues. These include: welfare benefits, health and disability, money management, housing options, accessing care, and travel and transport queries.

The information and advice service helps people to navigate complex statutory systems and ensure they have the benefits they are entitled to.

This can improve people's economic situation and also reduce anxiety that can be felt due to changing or challenging circumstances.

Legacies, however big or small, really help us to continue to deliver our services to local older people.



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"I don't know how I would cope without my volunteer from Age UK Wandsworth, I couldn't do my shopping or get to the bank. My old legs won't get me there anymore!"

Mrs W, Battersea



Making a Will or Codicil

If you already have a Will, now may be a good time to review it in order to ensure that it still suits your current circumstances and wishes. For example, the arrival of a grandchild, or the sale of your property or divorce can all add to complications. A review will provide a great opportunity to include Age UK Wandsworth or other charities in your Will.

If no review is necessary, a safe and legally binding option is to draft a Codicil. A Codicil is attached to your existing Will and would deal specifically with your bequest. You can download a Codicil template from our website.

Instead of making alterations to your existing Will document, a useful tip would be to draft a Codicil or make a new Will.

Should you decide not to make a new Will or draft a Codicil, an alternative would be to include a 'Letter of Wishes' alongside your Will. Whilst not legally binding, a Letter of Wishes will inform your executors of your desire to leave a gift to Age UK Wandsworth. It is advised to deposit this letter with your executors for safekeeping.

Leaving a Gift to Us

Thank you for generously considering leaving Age UK Wandsworth a gift or legacy in your Will. These are a valuable source of funding for us to continue helping the community of older people within the Wandsworth borough.

You may choose to leave a fixed amount of money, or gift us a particular item, such as a piece of jewellery, stocks and shares or household items. You may decide to leave a residue of your estate after everyone else has been taken care of.

It is important to specify Age UK Wandsworth, rather than Age UK, if you wish the money to be spent helping people locally. You can use the following wording as a template or guide:

'I leave my / X share (s) of my residuary estate for Age UK Wandsworth, 549 Old York Road, Wandsworth, London, SW18 1TQ, registered charity number 1069406 (England and Wales), absolutely for its general charitable purposes and I declare that the receipt of the treasurer or other proper officer for the time being shall be a sufficient discharge to my executors.'

Useful to Know

Age UK Wandsworth

You can refer to our website or come to our offices for a leaflet on how to make a Will.

www.ageuk.org.uk/wandsworth

Age UK

Advice and information for people in later life through their Age UK Advice line, publications and website.

Age UK Advice: 0800 169 65 65

www.ageuk.org.uk

GOV.UK

The official Government website that provides information on public services such as legal advice and legal aid.

www.gov.uk

Law Society of England and Wales

Representative body for solicitors in England and Wales.

Tel: 020 7320 5650

www.lawsociety.org.uk/for-the-public

Citizens Advice

National network of advice centres offering free, confidential, independent advice, face to face or by telephone.

www.citizensadvice.org.uk

Free Wills Month

Charities provide the opportunity to have their Wills written or updated free of charge by selected solicitors in locations across the country.

www.freewillsmoth.org.uk



Solicitors for the Elderly

Independent, national organisation of solicitors, barristers and legal executives, who can provide legal help to older and vulnerable people, their families and carers.

Tel: 0844 567 6173

www.sfe.legal

Will Aid

Partnership between legal profession and nine UK charities, including Age UK, to help people have their wills written professionally,

Tel 0300 0309 558

www.willaid.org.uk



Thank you for considering us.

Together, we can help Wandsworth age well.

www.ageuk.org.uk/wandsworth

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