

## Useful organisations

### Bereavement Register

Register of names and addresses of deceased persons to help stop unsolicited mail.

Tel: 020 7089 6430

Tel: 0800 082 1230 (24 hour automated registration service)

[www.thebereavementregister.org.uk](http://www.thebereavementregister.org.uk)

### Law Society of England and Wales

Representative body for solicitors in England and Wales. Use the 'find a solicitor' tool on the website [www.lawsociety.org.uk](http://www.lawsociety.org.uk)

Tel: 020 7242 1222

### Principal Probate Registry

Information and advice on dealing with an estate and contact details for local probate registries.

Tel: 0300 123 1072 (Probate and Inheritance Tax Helpline)

[www.gov.uk/wills-probate-inheritance](http://www.gov.uk/wills-probate-inheritance)

### Tell us Once

A service that allows you to inform several government departments (such as the housing department, the DVLA and HMRC) about a person's death at once.

[www.gov.uk/tell-us-once](http://www.gov.uk/tell-us-once)

### Need Help or More information?

If you have any questions please, do get in touch. We aren't solicitors ourselves but we can answer any general questions you have about Wills and gifts in Wills. We can tell you more about how St Leonard's Hospice supports local people with life limiting illnesses and invite you to visit the Hospice.

Fundraising: **01904 777 777**

[legacies@stleonardshospice.nhs.uk](mailto:legacies@stleonardshospice.nhs.uk)

Or visit our website: [st.leonardshospice.org.uk](http://st.leonardshospice.org.uk)

St Leonard's Hospice, 185 Tadcaster Road, York, YO24 1GL

Hospice Main Reception: **01904 708553**

St. Leonard's Hospice, York is a registered charity, no. 509294 and a company limited by guarantee, registered in England and Wales, no. 01451533

St Leonard's  
Hospice

Caring for Local People



# Preparing to make your Will



What you should  
consider before  
you visit your  
solicitor



Have  
the Will  
to make  
a difference

## Step 1 – Make a note of your assets (everything you own) and debts (everything you owe).

### Assets may include:

- Your own home and any investment property
- Bank or building society accounts
- Life insurance policies
- Shares and bonds
- Superannuation or retirement funds
- Pensions
- Cars/boats/caravans
- Furniture and appliances
- Specific items such as cameras, jewellery, works of art, antiques
- Collectables like stamps and coins

### A few things that aren't included in your estate are:

- Pensions or life insurance policies written in trust; these go directly to the person you nominated when you took out the policy.
- Joint bank accounts; these automatically go to the joint owner when you die.
- Jointly owned property; if you own the property as joint tenants.

### Debts may include:

- A mortgage
- Credit card balance
- Bank overdrafts
- Equity release

## Step 2 – Write down the names, addresses and contact numbers of your intended beneficiaries (the people/organisations to whom you wish to leave a gift).

These may include:

- Next of kin and family
- Friends
- Clubs and organisations of which you are a member
- Favourite charities

## Step 3 – Decide on the division of your assets.

Ensure that your wishes are made very clear. You may want to consider:

- Any specific gifts you would like people to have.
- Where you would like the residue to go (this is property/money that is left after paying funeral expenses, debts, specific gifts, administrative expenses and taxes).
- What you want to happen if any of your beneficiaries die before you.
- Your funeral wishes. Unlike the rest of your Will these aren't legally binding but including them does make decision making easier for your loved ones.

After providing for your family, friends and loved ones, you may choose to support St Leonard's Hospice by leaving:

- The remainder (residue) of your estate.
- A percentage of your estate (a gift of just 1% makes a big difference)
- A specific sum
- All or part of a particular asset or share portfolio
- The whole of your estate

## Step 4 – Choose your executors.

Executors are the people who make sure your estate is administered as you have chosen. They can be solicitors, who will charge for the service. Alternatively you may want to appoint trusted friends or family. People who will benefit from your Will can also be executors. Being an executor involves a lot of work and responsibility so it is important to consider your choices carefully.

## Step 5 – Write your Will.

We would always recommend using a qualified solicitor. You can find one via the Law Society or the Solicitors Regulation Authority. Your solicitor will ask what your wishes are so that they can draft your Will. Once you are happy

with the wording you must sign your Will in the presence of two independent witnesses for it to be valid. The witnesses cannot be beneficiaries of the Will. You must have 'mental capacity' to make your Will, otherwise it will be invalid. Talk to your solicitor if you have any concerns about yourself or a family member's capacity to make a Will.

## Step 6 - Keep your Will safe.

It is important your Will is stored safely and crucially that you tell your executors where they will be able to find it after your death. If you have used the services of a solicitor they will usually store it for you free of charge and give you a copy. Alternatively you could store it with the Probate Service in England & Wales. There is a small fee to do this but withdrawing it is free.

## Your Lasting Legacy

Leaving a gift in your Will is a wonderful way to help St Leonard's Hospice continue to make a difference to the local community in the future. This act of generosity has no financial impact during your life, but it will help care for local patients after your death.

