

## Will you be a part of our future by leaving Samaritans a gift in your Will?

It's something many of us avoid, but making a Will is worthwhile and the steps below could make it easier than you think.

Samaritans always recommends consulting a solicitor to ensure your wishes are carried out in full, but it's useful to do a little preparation beforehand.

### ➤ Choosing what type of gift to leave

You could decide to leave a cash gift in your Will, but there are also other choices you may wish to consider. Below are the main types of gifts found in a Will.

#### **Residuary gift or share of your estate**

A residuary gift can either be a portion of your total estate such as a half (50% share), a quarter (25% share), a smaller portion or all of an estate. You can give as little or as much as you'd like. Your decision will depend on who you wish to remember in your Will and how much you wish to leave them. You may also choose one or more causes you care about. As the value of residuary gift tends to hold its value, it's useful for planning future gifts.

#### **Pecuniary gift (also known as a cash gift)**

A pecuniary gift is a cash amount. There's no minimum or maximum value. You simply need to detail your chosen amount(s) and the person(s) or cause(s) you wish to benefit in the future. It's also possible to index link a cash gift. This means it will retain its value over time. A solicitor should be able to index link a gift if you ask.

#### **Specific gifts**

A specific gift is a personal possession, such as a diamond ring. Many possessions have sentimental value but some – such as a family heirloom – may also have financial value. Personal possessions could also include a music collection, property, furnishings or even a family business.

**Gifts in Wills come in all shapes and sizes, they needn't be large. It's up to you how much you wish to give.**

**Every gift will make a difference to someone who needs our support in the future.**

## 6 Steps to planning a Will

### 1. Work out the value of your estate

Make a list of your assets and estimate their value<sup>1</sup> (for example your home, valuables, savings and investments). Then do the same with what you owe. Take the second away from the first, and you're left with what's called your total estate value.

### 2. Decide who you'd like to benefit and how

Now you know how much you're worth, it's time to decide who you'd like to remember in your Will – friends, family and favourite charities – and how you'd like to divide your estate between them. Just 1% of your estate will make a difference if you choose to leave a gift in your Will to Samaritans.

### 3. Consider any additional requirements

For example, guardians may be appointed to care for children up to a certain age. It may also be appropriate to set up a trust to benefit or care for a family member(s) or support good causes at the discretion of trustees. It's also common to highlight funeral wishes, such as music preferences and donations in lieu of flowers.

### 4. Choose Executors for your Will

An Executor is someone who will help carry out the terms of your Will. Select a minimum of two reliable, trustworthy individuals, who will be named as executors in your Will and shall be responsible for the administration of your estate. Lay executors such as family often choose to appoint a solicitor to take on this responsibility, as it can be time-consuming and may require legal knowledge.

### 5. Select a solicitor

Samaritans can offer you some guidance, but we're unable to give legal advice or comment on personal circumstances. See next page for details on how to find a solicitor, who can give you a personal service.

### 6. Select two witnesses

Two people are required to sign and witness your Will in the presence of each other. Witnesses must be independent and cannot be beneficiaries of the Will. An unwitnessed Will is not legal.

### 7. Keep your Will safe

Most people like to leave one copy in the care of their solicitor, and keep their own copy in a safe place (to make things easier at what can be a difficult time, make sure your Executors know where to find it). The location of a Will can be recorded on databases like [certainty.org.uk](https://www.certainty.org.uk) (The National Will Register) that are available to members of the public to search, for a fee. The National Will Register is contactable via their Helpline **0330 100 3660**.

### 8. Review it regularly

People's lives can quickly change – marriages, divorces, children, grandchildren or house moves. So it's a good idea to check your Will is up-to-date every five years or so. This helps to ensure that your Will is still validated and legally binding.

## ➤ Suggested wording for remembering Samaritans in your Will

You may wish to share the below with your solicitor, as it could save them time.

#### For a pecuniary gift or a specific gift

*I give to Samaritans, registered charity in England and Wales (219432) and in Scotland (SC040604) of The Upper Mill, Kingston Road, Epsom KT17 2AF, the sum of £x to be used for its general charitable purposes and I direct that the receipt of the treasurer or duly authorised officer shall be sufficient discharge to my executors.*

#### For a residuary gift

*I give **all/fraction/% share** of the residue of my estate to Samaritans, registered charity in England and Wales (219432) and in Scotland (SC040604) of The Upper Mill, Kingston Road, Epsom KT17 2AF, to be used for its general charitable purposes and I direct that the receipt of the treasurer or duly authorised officer shall be sufficient discharge to my executors.*

<sup>1</sup> This will help you plan for any inheritance tax that may apply to the value of your estate.

## ➤ Our promise to you

Our supporters are at the centre of everything we do and therefore we pledge to uphold the below commitments:

- We'll always respect confidentiality and your right to privacy.
- We respect your choice and will never put you under any pressure to leave a gift in your Will.
- Family are often the closest people in our lives, and we know their needs will always come first.
- We understand not everyone wishes to share details of a gift in their Will and respect everyone's right to privacy.
- As a custodian of supporters' donations, we use all gifts wisely and effectively.
- We don't know what the future holds, but we'll do our best to uphold any wishes you have about the use of a gift in your Will.

## How do I find a solicitor near me?

You can find a solicitor via The National Will Register by visiting [certainty.org.uk](https://certainty.org.uk) or through the Law Society as below:

**England & Wales**  
[lawsociety.org.uk](https://lawsociety.org.uk)  
 020 7242 1222

**Scotland**  
[lawscot.org.uk](https://lawscot.org.uk)  
 0131 226 7411

**Northern Ireland**  
[lawsoc-ni.org](https://lawsoc-ni.org)  
 028 9023 1614

Laws and legal terms such as probate can vary between England & Wales, Northern Ireland and Scotland, so it is advisable to check for any exceptions. A solicitor will advise in accordance with your nation of residence.

There are also a range of other organisations such as banks that offer regulated Will writing services.

## Glossary

Visit [samaritans.org/legacyterms](https://samaritans.org/legacyterms) for definitions of some of the terms you may come across when planning your Will.

## Thank you

Thank you for your interest in leaving a gift in your Will to Samaritans, we hope you find this information useful. If you would like any further guidance or wish to find out more about Samaritans, please get in touch with our friendly Supporter Care team on **03709 00 00 32** or email [supportercare@samaritans.org](mailto:supportercare@samaritans.org). Our latest news and details about what we do and how to support us can also be found on our website [samaritans.org](https://samaritans.org).

Gifts in Wills provide a lifeline to people who've turned to Samaritans when they're no longer able to face their struggles alone. Could you find a place in your Will for Samaritans too?

[samaritans.org/legacy](https://samaritans.org/legacy)



My youngest daughter Emily\* tried to take her own life when she was in her twenties. She had suffered with depression for some time, and found it difficult to deal with her thoughts and feelings. I can't describe how painful it is to see your child feel this helpless. When things were particularly difficult for Emily, she turned to Samaritans for support.

I will always be grateful to Samaritans, and by leaving a legacy I can help them be there for more people like my daughter.

**Samaritans supporter**



\*Names have been changed