



The Trustees for the University College London Hospitals Charity

CHARITY REGISTRATION NO 229771

5th Floor East, 250 Euston Road, London NW1 2PG

Tel: 020 7380 9742 | Fax: 020 7380 9544 | zung.to@uclh.nhs.uk

MAKING A LEGACY | WILL | CODICIL

THANK YOU for thinking of including the University College London Hospitals (“UCLH”) in your Will. All the legacies UCLH receives are administered by the UCLH Charity.

UCLH Charity offers extras in terms of grants for equipment and improvements to wards in order to improve the patients’ and relatives’ experience. It also regularly funds research projects to find cures and treatments for a wide range of conditions.

When making a legacy to UCLH the following steps and information may be useful to you.

This is a guide to preparing, making or amending (adding a Codicil to) your Will. It does not constitute legal advice and we strongly advise that you should seek professional advice to write or amend your Will. A solicitor will also be able to give advice as to tax planning. Legacy gifts to registered charities like UCLH Charity are exempt from tax and reduce the value of your estate for tax purposes.

For a Will to be valid, it must be:

- made by a person who is 18 years old or over;
- made voluntarily and without pressure from any other person;
- made by a person who is of sound mind. This means the person must be fully aware of the nature of the document being written or signed and aware of the property and the identify of the people who may inherit;
- in writing;
- signed by the person making the will in the presence of two witnesses; and
- signed by the two witnesses, in the presence of the person making the will, after it has been signed. A witness or the married partner of a witness cannot benefit from a will. If a witness is a beneficiary (or the married partner or civil partner of a beneficiary), the will is still valid but the beneficiary will not be able to inherit under the will.

Although it will be legally valid even if it is not dated, it is advisable to ensure that the Will also includes the date on which it is signed.

If you are making your Will while on the premises of any of the UCL hospitals, please note that no member of UCLH staff can witness your signature if this organisation is a beneficiary as such an act could invalidate the Will because a witness cannot be a beneficiary.

If you wish to discuss any matters relating to leaving a legacy to UCLH Charity, please contact Zung To at the address above.

Please see documents:

- A. [Steps to Making A Will](#)
- B. [Checklist for Will Making](#)



The Trustees for the University College London Hospitals Charity

CHARITY REGISTRATION NO 229771

5th Floor East, 250 Euston Road, London NW1 2PG

Tel: 020 7380 9742 | Fax: 020 7380 9544 | zung.to@uclh.nhs.uk

STEPS TO MAKING A WILL

STEP 1: APPOINT A SOLICITOR

A list of solicitors who deal with wills and probate in your area can be found on the Law Society website:

www.lawsociety.org.uk

Before visiting a solicitor, it is worthwhile putting the following details together and a simple checklist is attached*. Your solicitor may also request a copy of your birth certificate, marriage certificate/divorce details, property details/mortgage deeds, and any earlier Will (if you have made one).

STEP 2 INFORMATION TO TAKE TO THE SOLICITOR

By taking the following information to your solicitor, it will save time and ensure that all the information is to hand when drafting your Will. Remember to split the value of any joint assets or liabilities.

Your Details: Full name, address and post code, telephone number.

Value of Your Estate: Up-to-date information as to the value of your estate would assist. Things to think about would be: house; antiques/paintings; household contents; vehicles; jewellery; savings and investments; bank/building society accounts; stocks, shares and bonds; National Savings/Premium Bonds; insurance policies, pensions, endowments and any other assets you would like included.

Liabilities: This will include any debts i.e. mortgages; loans; credit card balances; credit agreements or HP agreements;

* Checklist attached.

overdrafts; tax bills and any other outstanding debts.

STEP 3: WHO DO YOU WISH TO BENEFIT?

Two-thirds of us who die do so without making a Will. A Will ensures your wishes are carried out and will save problems for your loved ones who are left behind. Those who benefit are your "beneficiaries". They may include family, friends and any causes that you would like to leave a legacy to. The solicitor will require their contact details and how your estate is to be divided. You may wish to ensure that a legal guardian is appointed if you have children or other dependents under the age of 18.

STEP 4: LEAVING A LEGACY OR GIFT (BEQUEST) TO UCLH

After your family and friends, you may wish to leave a gift to UCLH. This is called a "Bequest". You will need our full name, charity number and registered address – see details above. You can leave a bequest for general purposes and the Trustees will ensure that it is spent on the most urgent projects. It also helps if a bequest is not too specific as types of equipment, ward names and treatments may all change over time. If a bequest is too specific or has conditions it may mean that it cannot be used. A preference is better than a condition of the Will. There are a number of various bequests but the bequests below are helpful to UCLH. You can choose to leave us a share of your estate or alternatively set aside a fixed sum of money.

Pecuniary Bequest: This is a gift of a fixed sum of money.

I give the sum of £...(amount in figures and words) to UCLH Charity (registered charity no 229771, 5th

Floor East, 250 Euston Road, London NW1 2PG) and I direct that the receipt of the Treasurer or duly authorised officer shall be a valid and appropriate form of discharge.

Residuary Bequest: A gift made of the remainder/residual of your estate after all other beneficiaries are provided for and any debt, tax and administration costs have been met.

I give all (or a % share) of the residue of my estate to UCLH Charity (registered charity no 229771, 5th Floor East, 250 Euston Road, London NW1 2PG) and I direct that the receipt of the Treasurer or duly authorised officer shall be a valid and appropriate form of discharge.

Specific Bequest: This is a particular item or asset left as a gift. An example would be a piece of jewellery, furniture or painting. Be as specific as possible to avoid any misunderstandings.

It is also a good idea to include the following wording at the end of the Bequest:

If at my death any charity named as a beneficiary in this Will or any Codicil hereto has changed its name or amalgamated with or transferred its assets to another body then my Executors shall give effect to any gift made to such charity as if it had been made (in the first case) to the body in its changed name or (in the second place) to the body which results from such amalgamation or to which such transfer has been made.

STEP 5: WHO WILL CARRY OUT YOUR WILL?

In your Will, you appoint "Executors". They are appointed to carry out your instructions left in your Will. The solicitor will need details of your executors – who can be family, friends and/or professionals. Executors can be beneficiaries to the Will. It is usual to have someone younger than yourself and ideally someone who would understand financial matters. It may help to add a side letter, setting out your instructions to the Executors.

STEP 6: OTHER WISHES

How would you like to be buried – buried or cremated? Any wishes for the funeral? All the information will be of help to your loved ones.

STEP 7: SIGNING OF A WILL

Until the Will has been signed it is not valid. It must be witnessed and those witnesses cannot be beneficiaries under the Will.

STEP 8: AMENDING AND UPDATING YOUR WILL

It is always a good idea to review your Will after any major life changes for example, getting married, having a child, divorced or moving house. A minor change to your will is called a "Codicil".

STEP 9: A CODICIL TO AN EXISTING WILL

A Codicil is a minor amendment or change to your Will. Sample wording as follows:

I [name] of [address] DECLARE THIS to be a codicil to my last Will

1. IN addition to the provisions of my said Will I GIVE to UCLH Charity (registered charity no 229771, 5th Floor East, 250 Euston Road, London NW1 2PG) for its general purposes/ specific purpose

EITHER:

a) The sum of £..... or

b) [all or a specified percentage] of the residue of my estate

2. IN WITNESS whereof I have hereunto set my hand this [day] day of [date] SIGNED as a codicil in the presence of us both present at the same time who at his/her request and in his/her presence and in the presence of each other have hereunto subscribed our names as witnesses:- [space for signature]

A solicitor can assist you with the final wording.



The Trustees for the University College London Hospitals Charity

CHARITY REGISTRATION NO 229771

5th Floor East, 250 Euston Road, London NW1 2PG

Tel: 020 7380 9742 | Fax: 020 7380 9544 | zung.to@uclh.nhs.uk

CHECKLIST FOR WILL MAKING

YOUR DETAILS:

FULL NAME:			
ADDRESS:			
POSTCODE:			
TELEPHONE NUMBERS:	H:	W:	M:

YOUR ASSETS: *Approximate value*

YOUR HOME:	£	OTHER PROPERTY/LAND:	£
HOUSEHOLD CONTENTS:	£	VALUABLES/ANTIQUES:	£
JEWELLERY:	£	VEHICLES:	£
SAVINGS/ISAS:	£	CURRENT ACCOUNTS:	£
INVESTMENTS: STOCKS/SHARES/BONDS	£	LIFE INSURANCE:	£
ENDOWMENTS:	£	PENSIONS:	£
NATIONAL SAVINGS/ PREMIUM BONDS:	£	OTHER ASSETS:	
	£		£
		TOTAL ASSETS:	£

YOUR LIABILITIES:

MORTGAGE:	£	LOANS:	£
CREDIT CARDS:	£	HP/CREDIT AGREEMENTS:	£
OTHER LIABILITIES:	£	BANK OVERDRAFTS:	£
	£		£
		TOTAL LIABILITIES:	£

TOTAL:

NET ASSETS: (Total Assets <i>minus</i> Total Liabilities)	£
--	---

BENEFICIARIES:

FULL NAME:			
ADDRESS:			
POSTCODE:			
TELEPHONE NUMBERS:	H:	W:	M:

FULL NAME:			
ADDRESS:			
POSTCODE:			
TELEPHONE NUMBERS:	H:	W:	M:

FULL NAME:			
ADDRESS:			
POSTCODE:			
TELEPHONE NUMBERS:	H:	W:	M:

FULL NAME:			
ADDRESS:			
POSTCODE:			
TELEPHONE NUMBERS:	H:	W:	M:

FULL NAME:	UCLH Charity (registered charity no 229771)		
ADDRESS:	5th Floor East 250 Euston Road		
	London NW1 2PG		
POSTCODE:			
TELEPHONE NUMBERS:	H:	W: 020 7380 9742	M:

GUARDIANS: *For any children under 18*

FULL NAME:			
ADDRESS:			
POSTCODE:			
TELEPHONE NUMBERS:	H:	W:	M:

FULL NAME:			
ADDRESS:			
POSTCODE:			
TELEPHONE NUMBERS:	H:	W:	M:

EXECUTORS: *Four is the maximum and it is sensible to have two*

FULL NAME:			
ADDRESS:			
POSTCODE:			
TELEPHONE NUMBERS:	H:	W:	M:

FULL NAME:			
ADDRESS:			
POSTCODE:			
TELEPHONE NUMBERS:	H:	W:	M:

FULL NAME:			
ADDRESS:			
POSTCODE:			
TELEPHONE NUMBERS:	H:	W:	M: