



UCLH Charity

Registered charity no. 1165398

Company no. 9980449

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

Tel: 020 3447 9742 | email: trustees@uclh.nhs.uk

MAKING A WILL

Thank you for thinking of including University College London Hospitals (UCLH) in your Will. Legacies received at UCLH are administered by UCLH Charity. Your support will help UCLH improve patient care and carry out pioneering research projects to find cures and treatments for a wide range of conditions. We are grateful for your bequest and we will ensure that your wishes are carried out accordingly.

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

For a Will to be valid, it must be in writing and:

- 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.
- Signed and dated by the person making the will in the presence of two witnesses, who are not beneficiaries of the will.

If you are making your Will while on the premises of any of the UCLH hospitals, please note that no member of UCLH staff can witness your signature if this organisation is a beneficiary. 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 us at the address above.

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, see checklist below.

STEP 2: Information to take to the solicitor

Taking the following information to your solicitor 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, see checklist below.

1. **Your details:** Full name, address and post code, telephone number.
2. **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; insurance policies, pensions, endowments and any other assets you would like included.
3. **Liabilities:** This will include any debts i.e. mortgages; loans; credit card balances; credit agreements; overdrafts; tax bills and any other outstanding debts.

STEP 3: Your wishes and who you wish to benefit

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.

STEP 4: Leaving a legacy to UCLH

If you wish to leave a gift to UCLH, this is called a “Bequest”. You can leave a bequest for general purposes and we will ensure that it is spent on the most urgent projects.

It helps if a bequest is not too exact as types of equipment, ward names and treatments may change over time. If a bequest is too specific it may mean that we will not be able to meet all the conditions in the future and the legacy will not be used to help the works of the hospital.

There are three main types of bequests that you can choose to leave UCLH a share of your estate:

Pecuniary Bequest: This is a gift of a fixed sum of money, and we recommend the following wording:

“I give the sum of £...(amount in figures and words) to UCLH Charity (registered charity no.1165398, 5th Floor East, 250 Euston Road, London NW1 2PG) for the [general benefit of UCLH] or [a specific area that you wish to support] and I direct that the receipt of a duly authorised officer of UCLH Charity 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. We recommend the following wording:

“I give all (or a % share) of the residue of my estate to UCLH Charity (registered charity no 1165398, 5th Floor East, 250 Euston Road, London NW1 2PG) for the [general benefit of UCLH] or [a specific area that you wish to support] and I direct that the receipt of a duly authorised officer of UCLH Charity 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. We recommend the following wording:

“I give to UCLH Charity (registered charity no 1165398, 5th Floor East, 250 Euston Road, London NW1 2PG) for the [general benefit of UCLH] or [a specific area that you wish to support] my [name and description of the items] and I direct that the receipt of a duly authorised officer of UCLH Charity shall be a valid and appropriate form of discharge.”

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 to the body in its changed name or 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 who would understand financial matters. It may help to add a side letter, setting out your instructions to the Executors.

STEP 6: 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.

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 change to your will is called a “Codicil”.

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 1165398, 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: (space for the names, addresses and signatures of witnesses” A solicitor can assist you with the final wording.

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:

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

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

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

FULL NAME:	UCLH Charity (registered charity no 1165398)		
ADDRESS:	5th Floor East 250 Euston Road		
POSTCODE:	London NW1 2PG		
TELEPHONE NUMBERS:	H:	W: 020 3447 9742	M:

EXECUTORS: *It is sensible to have two*

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

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