



# Your gift Their future

A Guide to writing your will

leeds:  
cares

the official charity partner of  
Leeds Teaching Hospitals

Charity no 1170369

# A guide to writing your will

Everyone should make a will to ensure their final wishes are met and the people and causes they care about benefit in the way they choose.

Knowing where to get started and thinking about what to include can be tricky.

This guide has been designed to allow you to write down some thoughts ahead of meeting with your solicitor. You might also like to use it to talk through your wishes with family.

This is only intended as a guide and your solicitor will be able to advise you formally and ensure the wording of your will is clear and meets the necessary legal requirements.

## There are some simple steps to follow:

- Work out the value of your estate
- Choose your executor(s)
- If you have dependent children, decide who you would like to look after them
- Decide who you would like to leave any specific items to e.g. paintings, jewellery etc
- Choose who you would like to leave a gift of a set sum of money to
- Decide who should receive the residue of your estate after all gifts of set sums have
- been paid
- Think about any wishes concerning your funeral
- Make a note of any additional questions to ask your solicitor.



# 1. Working out the approximate value of your estate

Use the first section of the guide below to work out the value of your main assets. Then use the second section to list any money you currently owe and deduct this from the above figure.

This will then give you an approximate value of your estate.

<b>Value of main assets</b>	<b>£</b>
Home	
Second property or land	
Car	
Personal possessions of notable value	
Money in banks and/or building societies	
Shares, investments, Premium Bonds etc	
Life assurance policies	
Pension policies	
Other items not listed above	
<b>Total assets (A)</b>	<b>£</b>

<b>Money owed</b>	<b>£</b>
Mortgage	
Other loans	
Overdrafts / credit cards	
Other items not listed above	
<b>Total money owed (B)</b>	<b>£</b>

<b>Value of estate (A minus B)</b>	<b>£</b>
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## 2. Your executors

This is the person(s) who will deal with your estate and ensure your wishes are met. It may be family, friends, or your solicitor.

It's always best to ask somebody first and to have an alternative in case, when the time comes, your first choice is not able to deal with matters.

### First Choice

Full name(s)	Full address(es) (including post code)

### Second Choice

Full name(s)	Full address(es) (including post code)

## 3. Taking care of dependent children

If you have dependent children, it's important to appoint a guardian to look after them.

Please remember to discuss this with the person you nominate to ensure they are agreeable.

Full names of children	Dates of Birth

Full name(s) of guardian(s)	Full address(es) (including post code)

## 4. Deciding what gifts to leave and to whom

Use the sections below to list who should receive any specific items or cash gifts from your estate.

You can choose to leave gifts of either a set sum of money or a share of your estate to family, friends or charities.

Points to remember:

- You must include at least one person or charity to receive the balance of your estate once all other gifts have been settled
- The total of all percentage shares must add up to exactly 100 per cent
- It can be a good idea to think about what should happen to any gifts should an intended recipient not be alive, or if a charity has closed. Perhaps list this as a point to discuss with your solicitor.

### Gifts of specific items

Full name	Full address (including post code)	Specific item (description and location)

### Gifts to individuals

Full name	Full address (including post code)	Amount £	Share %

## Gifts to individuals

Gifts to charities will reduce the amount of inheritance tax that your estate may have to pay. Charity gifts totalling at least 10 per cent of the value of your estate will also reduce the rate of inheritance tax (if applicable).

Your solicitor or professional adviser will be able to provide further advice in this regard.

Full name of charity	Full address (including post code)	Registered charity number	Amount £	Share %

## Leaving a gift in your will to Leeds Cares

After providing for your loved ones, a gift to Leeds Cares is another way of showing how much you care – because small or large, your gift will help to improve health and wellbeing for your family and everyone in Leeds, across Yorkshire and beyond.

If you decide you'd like to leave a gift to Leeds Cares in your will, thank you for doing so. Please include the following details in the section above:

Full name: **Leeds Cares**

Address: **Ground Floor, Trust Headquarters, St James's University Hospital, Leeds LS9 7TF**

Registered charity number: **1170369**

For more information about leaving a gift in your will to Leeds Cares, visit [leeds-cares.org/legacy](https://leeds-cares.org/legacy)

If you have any further questions, please feel free to get in touch with our Legacy Officer by emailing [legacies@leeds-cares.org](mailto:legacies@leeds-cares.org) or call **0113 206 5693**, and we'll do everything we can to help.

## 5. Funeral wishes

Use this section to record basic wishes about your funeral to be included in your will.

It's a good idea to write down more detailed wishes about your funeral and share these with your family, letting them know where the details are stored.

The organisation Dying Matters produces a guide called "My Funeral Wishes" that you may find helpful.

Tel: **08000 214466**

Website: **[www.dyingmatters.org](http://www.dyingmatters.org)**

<b>Type of service e.g. burial, cremation</b>	
<b>Preferred place of burial/ interment etc</b>	
<b>Any special instructions</b>	

## 6. Points to discuss with your solicitor

Use this section to make a note of any questions or points you'd like to discuss with your solicitor.

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Please note this form is not intended to constitute legal advice, merely a guide of some points to consider when making your will.

## Leeds Cares

Trust Headquarters,  
St James's University Hospital,  
Beckett Street,  
Leeds LS9 7TF

Leeds Cares is registered with the Fundraising Regulator and follows the Code of Fundraising Practice. We are committed to ensuring our fundraising activities are legal, open, honest and respectful. For more information, visit [www.fundraisingregulator.org.uk](http://www.fundraisingregulator.org.uk)

Charity Registration No. 1170369  
Company Registration No. 10492128



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