



# Remembering Harrogate Hospital & Community Charity in your will

By remembering Harrogate Hospital & Community Charity in your will, helps us do more for patients and their families across Harrogate & District NHS Foundation Trust and wider community.

# A Legacy is something that a person can be remembered by

Making a will is the only way to ensure your estate is handled in accordance with your wishes. It can be your gift to both the people and causes that are important to you.

In this guide there is some practical information on creating and updating your will. Writing a will and keeping it up to date is an important way to ensure that you retain control over your affairs and removes any uncertainty about your wishes for those left behind.



Harrogate Hospital  
& Community Charity

## Considerations before making a will

Charitable legacies are exempt from Inheritance tax so every penny of your gift will go to helping Harrogate Hospital & Community Charity do more for patients and their families.

If you do not have a will, even if you are married, living with a partner or have children, they will not automatically receive all of your estate when you die.

If you do not have a will, the law decides who inherits your property. You could leave your loved ones with lots of administration at what is an already difficult time for them.

Part or all of your estate may be left to people you never intended to benefit on your death.

Without a will, your loved ones may also have to pay more inheritance tax (IHT) than necessary. You may not think you are eligible for IHT, but when you consider your total estate, you may find that you have more than you realise, especially if you own your own home. All your possessions count towards the value of your estate, including your pension, jewellery, furniture, shares, to name a few.

## Inheritance tax and Professional Services

The inheritance tax threshold is the amount above which inheritance tax becomes payable. However, if you are leaving a gift to charity this may lower the Inheritance tax that is payable.

Harrogate Hospital & Community Charity strongly recommends using a solicitor or professional will writer to draw up your will. This is to ensure your wishes are fully understood and are legally binding. A solicitor will give you professional advice and include information on inheritance tax.

It is extremely important to keep your will up to date. Otherwise it may not reflect your wishes at the time of your death. It is important to review your will regularly - at least once every five years so if you have any major life changes, such as getting married or divorced, or having children or grandchildren these can be accounted for in your will.

## Ensure your will is valid

See your solicitor to make your will. It is important that your will is drawn up by a legal professional if the legal formalities are not followed then your will could be declared invalid. Please note that making changes directly to your will can invalidate the whole document. We strongly recommend, therefore, that you consult your solicitor. The wording of gifts may differ in Scotland - your solicitor will be able to advise you on the correct terms. Once you are happy with the contents of your will, make sure it is executed and witnessed properly. Your Solicitor can advise you on this.

## Types of gift

There are many different types of gift that you can choose when you are making a will. You need to make sure that you choose the right gift for your circumstances.

When deciding to leave a gift to Harrogate Hospital & Community Charity, there are many things to think about. Naturally, you will want to make sure you take care of your loved ones first, making sure that any gift you may choose to leave to us does not impact on your ability to provide for them.

### **That's why you may want to consider a residuary gift:**

- **Residuary gift:** A residual gift is a remainder or a percentage of whatever is left from your estate once provision has been made for your friends and family. This type of gift is also inflation proof since the proportion of your gift will stay the same over time and you won't have to update your will in the future.

### **Other types of gift:**

- **Pecuniary Bequest:** A gift of a fixed sum of money in your will is called a pecuniary bequest. Pecuniary bequests decrease in value over time as the cost of living increases. You might suggest to your solicitor or will writer that your cash gift is index-linked to ensure that its value increases with inflation.
- **Specific Bequest:** A particular item left as a gift is known as a specific bequest. For example a car or a piece of jewellery.
- **Contingent Bequest:** A gift which depends upon the occurrence of an event which may or may not happen is known legally as a contingent bequest. For example if other beneficiaries of the will die before the testator (the person who made the will).

These are all such generous ways of remembrance, as your legacy continues to create positive impact for patients and their families for many years to come.

## Frequently Asked Questions

*I'd like to make a gift to Harrogate Hospital & Community Charity in my will. What basic information do I need to include?*

The most important information you need to include is the Charity's registered name, address and Charity number. Please see our details below:

**Harrogate Hospital & Community Charity  
Planning Department  
Trust HQ  
Strayside Wing  
Harrogate and District NHS Foundation Trust  
Lancaster Park Road  
Harrogate  
HG2 7SX**

**Charity number: 1050008**

*Can I add Harrogate Hospital & Community Charity to my existing will?*

Yes - It is important to keep your will up-to-date. If you wish to make other amendments as well it may be wise to have a full update.

*Are there any tax benefits to leaving a gift in my will to Harrogate Hospital & Community Charity?*

If you leave a gift in your will to a charity (e.g. Harrogate Hospital and Community Charity) the gift is exempt of Inheritance tax. This means it is deducted from the total value of your estate before the calculation for Inheritance tax is made.

## Frequently Asked Questions

### Do I have enough to leave a gift in my will?

Any gift in a will, no matter how large or small will make a difference. It is a misconception that a legacy needs to be of a large value. Many supporters find it most helpful to leave a 'Residuary' gift in their will. This is a percentage of the remainder or 'residue' of your estate when all other gifts and payments have been made. In this way, you do not need to worry about having enough, as the gift will simply come from whatever is left over.

### What will you do with my money if I include Harrogate Hospital & Community Charity in my will?

With the money from a gift in your will, we will be able to help patient and their families at difficult times, providing additional equipment, training and services. By leaving a gift in your will to Harrogate Hospital & Community Charity you can make a real difference.

### We would like to thank you

Leaving money to Harrogate Hospital & Community Charity in your will is a highly personal and special gift. It is entirely up to you whether or not to inform the Charity of your gift. However, it would be wonderful to know so we are able to thank you and keep you up to date with all our charitable work.

Please email us or call us if you wish to let us know about your intended gift.

## Contact Harrogate Hospital & Community Charity

We hope that we have provided you with enough information to help you leave a gift in your will.

If you are an Executor dealing with an estate or if you need any further information or would like to discuss your will please contact:

**Sammy Lambert, Business Development, Charity and  
Volunteer Manager**

Telephone number: **01423 557528**

Email: **sammy.lambert@nhs.net**

Address:

**Harrogate Hospital & Community Charity  
Planning Department  
3rd Floor Strayside Wing  
Harrogate and District NHS Foundation Trust  
Lancaster Park Road  
Harrogate  
HG2 7SX**

If you would like this information in another format, please contact Harrogate Hospital and Community Charity as detailed above and we will provide this.

# Notes

