



Your Guide
TO LEAVING A GIFT
IN YOUR WILL



Thank you



A forever thank you

IN YOUR WILL CAN CHANGE LIVES FOR YEARS TO COME

Thank you for asking about leaving a gift to the South Western Ambulance Charity in your Will.

We hope you'll find this guide interesting and inspirational. And we hope that it gives you a clear understanding of why the work of over 230 NHS charities, including ours, is so very important to all of us.

We've also included practical information about how to make and change your Will and the kind of things to consider when writing it. As you'll see in the coming pages, Gifts in Wills are very special to South Western Ambulance Charity so we hope you'll join our community of supporters.

WHY
LEAVING A
forever
thank you
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PRECIOUS TO US



JOIN OUR
AMAZING
COMMUNITY
OF
SUPPORTERS

Since 1995 the South Western Ambulance Charity has been going the extra mile to support the staff and volunteers of the South Western Ambulance Service and the communities that they serve.

We cover 10,000 square miles across Gloucestershire, Wiltshire, Dorset, Bristol / North Somerset / South Glos, Somerset, Devon, Cornwall and the Isles of Scilly.

We support our amazing people - staff and volunteers - to look after their own health and wellbeing, and to develop their careers within the NHS ambulance service.

We work with South West communities to address local health inequalities and improve cardiac arrest survival rates by increasing access to defibrillator and CPR training.

Our activities simply could not happen without donations. There's so much more to do. A forever thank you in your Will can make a huge difference to this vital work.

A Gift in your Will is just one of many ways that you can choose to support our work. But we have received some amazing legacy gifts from generous supporters.

More and more people are asking how they can help the NHS to go further and do more.

Gifts in Wills to NHS charities do so much to help us support NHS patients, staff wellbeing, and to address local health issues. Every single gift is precious.

WHAT YOUR forever thank you CAN DO

Support for our people

To help staff who are feeling emotional, anxious or overwhelmed at times, we have provided quiet spaces & outdoor green spaces, like the Wellbeing Room in Bristol or the garden at Bournemouth Ambulance Station, where staff can take a moment to relax and recover.

Provide training & development support, like the C1 driving license bursaries we have provided to enable some Community First Responder volunteers to progress into an Emergency Care Assistant role.



Support for our patients and communities

Community First Responder (CFR) volunteers are on call to provide early, lifesaving emergency aid to their local communities, ahead of ambulance arrival. They save lives, reduce pain and provide reassurance to those requiring emergency care.

Donations provide CFRs with **specialist items of enhanced kit**, for example Raizer Lifting Chairs that help vulnerable people who have had a non-injury fall and need help to get up, or additional kit bags to enable more CFR volunteers to respond. Donations also fund dedicated **Community First Responder cars** that extend their capacity to help patients in need - particularly in our most remote and rural areas.

Together we can save lives by improving cardiac arrest survival rates. **Once in cardiac arrest for every minute that passes the chance of survival is reduced by 10%.** We support defibrillator placement, maintenance and training, and lifesaving CPR training, to give the best possible chance of survival.



Why your Will MATTERS TO YOU

Your Will may be one of the most important documents you ever write. That's because if you have last wishes, including them in your Will is a great way to be certain they're carried out. A Will is also an excellent place to record your funeral wishes.

Your Will can make sure that the right people get whatever you've decided to leave for them. It's a simple way to carry on looking after loved ones when you're no longer here.

If you die without a Will, the choices you've made may not actually be respected, and your loved ones could be left with difficult decisions to make, which could lead to distress.

Finally, your Will can also carry on your support for causes close to your heart. By including a gift to our Charity in your Will you can write a forever thank you that will carry on making a difference, long after you're gone.

THREE TYPES OF *gifts to leave in your Will.*

These are the three most common types of gift to leave in your Will...

1 I'd like to leave what's left of my estate

After you've taken care of your family and friends and paid off any debts or taxes, you can gift either a portion or all of what's left – it's up to you.

For example, just 1% of what remains of your estate could make a real difference. Many supporters like this kind of gift because, as a part of your overall estate, it keeps its value over time.

2 I'd like to leave a specific amount

Another option is to leave a fixed amount of money, which you set aside in your Will. This type of gift is paid out before the residue of your estate is calculated. But over time, inflation can reduce its value and make it less impactful.

3 I'd like to leave a specific gift

A specific gift is a particular valuable item – like property, shares or a piece of jewellery.

With any of these types of gifts, you are free to restrict your forever thank you to a certain type of work we do. But, if you leave them unrestricted, it means we can use your gift to help where the need is greatest at the time.

If you would like to chat about restricting your gift, please email us at charity@swast.nhs.uk



Gifts in Wills AND TAX

The good news is that any gifts left to charities are exempt from Inheritance Tax. On top of that, sometimes by including a gift to a charity you can reduce the tax on everything else you leave behind. But Inheritance Tax is a complex and often- changing area of law, so we advise you to visit www.gov.uk/inheritance-tax for all the latest information and speak to a professional.

YOUR *Will writing* CHECKLIST



Step 1

Make a list of your most valuable possessions. Remember to include any property you own, any savings or investments, as well as any valuable items like jewellery or paintings.

Step 2

Add up what you think they're worth. A rough estimate is all you'll need to help work out what gifts you'd like to make.

Step 3

Family and friends come first. Start by working out who you'd like to look after and what you'd like to leave them.

Step 4

Then remember causes close to your heart. Make a list of the charities you'd like to support and think about how you'd like to make those gifts.

Step 5

Choose executors and write your Will. Many people choose trusted family members as their executors. There are many ways available to write your Will, from consulting a professional to completing a simple template or using one of a variety of online services that can guide you through the process and verify your document.

It's sensible to keep your Will in a safe place – and to tell your executors where it is. Many professional Will writers and solicitors offer to store your Will. Don't worry if your life or decisions change. It is simple to write a new Will that can change your instructions, or to update your Will using what's called a 'codicil'.

USE THIS HANDY TEMPLATE TO WRITE your forever thank you

THE WORDING YOU NEED TO USE in your Will

STEP 1 & 2: List your valuable possessions and estimate their value

- 1
- 2
- 3
- 4
- 5

STEP 3: List what you'd like to leave to whom

- 1
- 2
- 3
- 4
- 5

STEP 4: List the charities you'd like to support and your gifts

- 1
- 2
- 3
- 4
- 5

STEP 5: List your executors

- 1
- 2



When you want to leave what's left of your estate

Subject to the payment of my debts, funeral and testamentary expenses, I give the whole/ _____ % of my estate not otherwise disposed of by this my Will to; South Western Ambulance Charity, SWASFT, Abbey Court, Eagle Way, Exeter EX2 7HY. Registered Charity No 1049230 (England & Wales) for their general purposes and I declare that the receipt of its Treasurer or other proper officer shall be a full and sufficient discharge.

When you want to leave a specific amount

I give free of tax to South Western Ambulance Charity, SWASFT, Abbey Court, Eagle Way, Exeter EX2 7HY Registered Charity No. 1186569 (England & Wales), the sum of £_____ for their general purposes and I declare that the receipt of its Treasurer or other proper officer shall be a full and sufficient discharge.

Now you're ready to write your Will

*“We understand that this is a big decision, and we are enormously grateful to you for considering this incredible way of supporting the South Western Ambulance Charity and writing your **forever thank you.**”*

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Zoe Larter

Head of Charity

South Western Ambulance Charity

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