



**Surrey**  
Wildlife Trust



# **Surrey Wildlife Trust**

# **Guide to Making a Will**

Some helpful advice for making or changing your Will

# Leaving a legacy to Surrey Wildlife Trust will make a huge difference to the wildlife in our county

**Thank you for caring about your local wildlife – and for caring enough to take this very important step of considering leaving a legacy to Surrey Wildlife Trust.**

It is only through the support of people like you that we are able to do so much to protect wildlife across Surrey. Ancient woodlands, rare heathland, chalk grassland and wetlands are managed to encourage healthy habitat brimming with life. We do everything we can to protect and connect wildlife both on our nature reserves and by working with other landowners and public bodies across the county.

Yet sadly the very survival of many habitats and species continues to be under threat and we are still losing wildlife at an alarming rate. It's vital to protect wildlife for years to come, and by maintaining and expanding safe spaces for nature and connecting them together with corridors of suitable habitat we can enable wildlife to move about, find food and shelter and breed more successfully. Only with your help will we succeed, and a bequest is one of the easiest ways to help protect our countryside for future generations.

**By leaving a gift in your Will to Surrey Wildlife Trust, you can make a real difference.**

We hope you find the information in this booklet useful in preparing your Will. If you would like to talk through your wishes before visiting your solicitor, then please contact us on 01483 795496.

**Thank you for all the support you already give and a special thank you for considering leaving a legacy to your local Wildlife Trust.**





## Why should you make a will?

Most people today understand the importance of making a Will and the need to review it on a regular basis. Making your Will is the only way to be absolutely certain that your money and your belongings go to the people and causes you care about.

A Will allows you to appoint someone to sort out your estate when you die. More importantly, it enables you to say who will look after your children if you and your partner should die. You can even make provision for your own funeral arrangements.

Investing some time and effort now will give you peace of mind knowing that you have put your affairs in order.

Updating an existing Will is also extremely important. Changes in your financial or family circumstances such as marriage, divorce, grandchildren, retirement or selling property can affect it. For instance, did you know that remarrying revokes any earlier Will?





## What could happen if you don't make a Will?

**Making a Will is so simple. Not making one can place an unnecessary burden of worry and heartache on those you leave behind.**

If you are without family and you haven't made a Will, all your belongings pass to the Crown. Your friends have no automatic claim by law and may receive nothing. If you have children under 18, it is important to make provision for them. You will want to think about your children's future in the unlikely event that you and your partner should die at the same time.

If a husband or wife dies leaving no Will, the survivor may not inherit the whole of the estate. This is particularly a danger where the house stands in the sole name of the deceased spouse. A Will is essential where partners live as husband and wife but are not married.

Sorting out who receives what is an expensive business and the legal cost will be paid out of your estate. It can also take a long time, during which your loved ones may be left without means of support. But most important is the fact that your estate may not be distributed as you would have wished.



# Choosing who will administer your estate

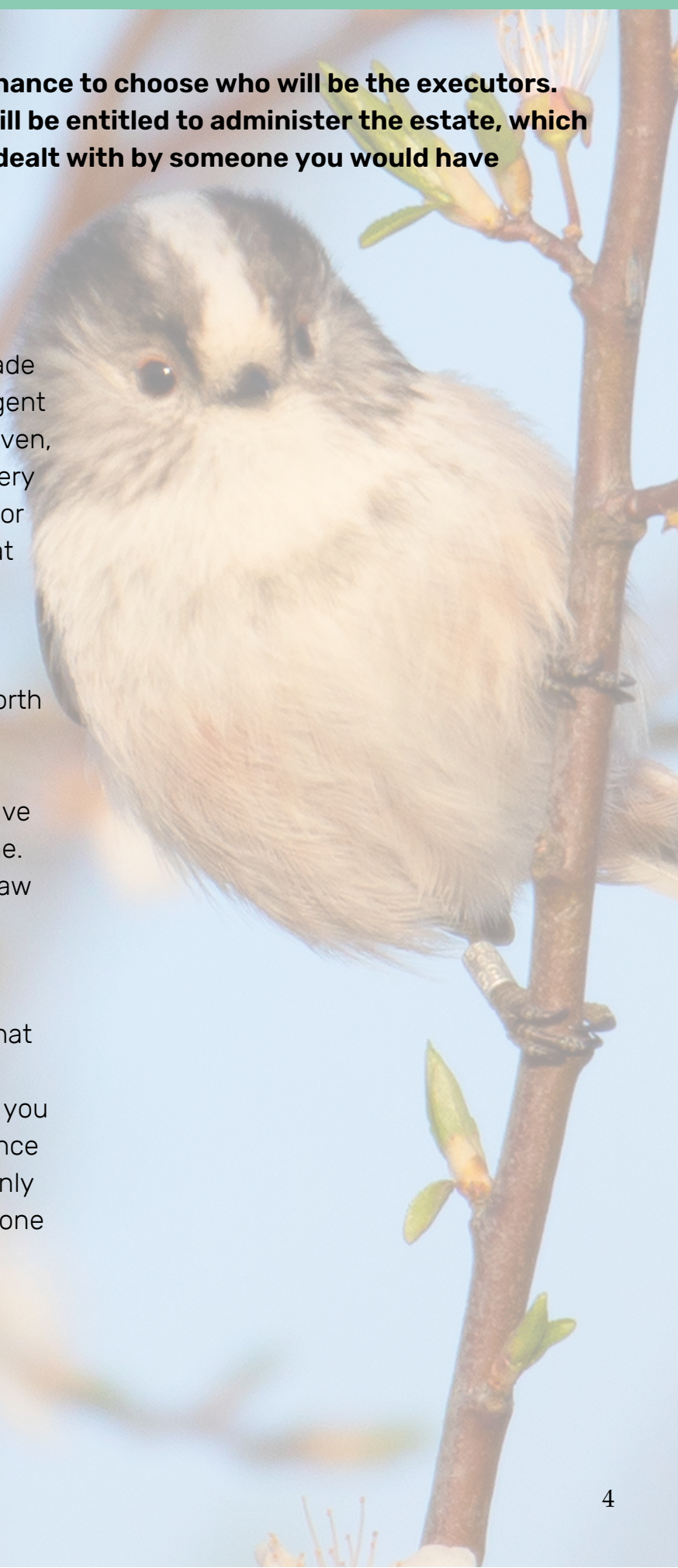
**When you make a Will you have a chance to choose who will be the executors. Otherwise, certain beneficiaries will be entitled to administer the estate, which could leave sensitive issues to be dealt with by someone you would have considered unsuitable.**

## Is it best to use a solicitor?

You may save money with a homemade Will or printed form from your newsagent - but can you trust it to be legally proven, validly signed and having covered every eventuality? The most important factor when you make a Will is to ensure that your lifetime wishes are carried out correctly after your death.

Having decided to make a Will, it is worth the reassurance of having it drawn professionally by a solicitor. You may have used a solicitor in the past or have friends who can recommend someone. Alternatively you could contact the Law Society or your local Citizen's Advice Bureau.

Ask the solicitor for an estimate of what the costs will be. They will be able to answer all your questions and advise you on how you can reduce your inheritance tax bills. Making a Will is almost certainly cheaper than the cost of not making one or making an incorrect one.



# How can you remember your favourite causes in your Will?

**It is only by making a Will that you can make a legally enforceable gift to charity on your death.**

**There are three ways to remember your loved ones and favourite causes in your Will:**

- **Residuary bequest** - if you wish to leave a percentage of your estate to charity (e.g. 10%). Once you have taken care of your friends and family, you can leave the remainder of your estate to one or several charities. Many people choose this option. This has the benefit that proportionally it will not devalue over time.
- **Pecuniary bequest** - if you wish to leave a specific sum of money to a person or charity (e.g. £1,000)
- **Specific bequest** - if you wish to leave a specific item to a loved one or charity, (e.g. shares in a company, a painting etc.).



# What to do next

By leaving a residuary bequest the charity will receive a proportion of your estate when all other bequests and expenses have been deducted. For the wording to use for a residuary bequest, go to the section called 'Getting the Wording Right' (pg. 10).

We strongly advise that you use a qualified solicitor to amend an existing Will or to include a gift in a new Will to ensure your wishes are properly recorded.

**Here are a few steps to help you make a Will and remember your favourite causes.**



## 1. Choose your executors

These are the people who will make sure your wishes are carried out. You can have up to four executors. Beneficiaries can be executors although their appointment could create a conflict of interest. Professionals, such as your solicitor, can also be executors.

Name and Address

Name and Address

Name and Address

Name and Address

## 2. Getting it all down on paper

It is worth listing all your assets and their approximate value, noting any items that are held jointly. This will save you time and money when you go to your solicitor.

### Property

Your home	£
Your second or holiday home/caravan	£
Your household contents (inc. clothes and furniture)	£
Antiques	£
Jewellery	£
Car	£
Other items of value	£
<b>Total value of property</b>	£

### Financial (again note any items held jointly)

Bank accounts	£
Building society accounts	£
Stocks and shares	£
National savings	£
Pension/benefits	£
Life assurance	£
Unit trusts	£
Business assets	£
Any further financial interests (e.g. family trusts and settlements)	£
<b>Total</b>	£



**Money you owe** (noting if these will be paid off on your death e.g. by an insurance company)

Outstanding mortgage	£
Other loans	£
Overdraft	£
Hire purchase	£
Credit card debts	£
Other money owed	£
<b>Total</b>	£

**Money you are owed**

Name and Address of debtors	
Date of loan	
<b>Amount outstanding</b>	£

**3. Decide who you would like to include in your Will and what you would like to leave them**

<b>Beneficiary (name of person or charity)</b>	<b>Share of estate (e.g. 10% of estate) Sum of money (e.g. £5,000) Specific item (e.g. painting)</b>
Surrey Wildlife Trust	

## 4. Other considerations

What do you want to happen to your estate if any of the people you have named die before you?

Do you and your family often travel together? If so, what do you want to happen to your estate if you die at the same time?

List any questions you want to ask your solicitor

**When you have made your Will, it will need to be properly signed and witnessed. There are strict formalities to be observed when witnessing Wills. An improperly witnessed document could lead to failure of the whole Will. Your solicitor can advise you on this point and arrange witnesses for your Will.**

# Getting the wording right

**The words used in a Will are very important. In particular, if you want to leave a bequest to Surrey Wildlife Trust, it is important to give our correct name so there can be no misunderstanding.**

## **Residuary bequest (a gift of what is left after other specific bequests have been settled)**

“I give to Surrey Wildlife Trust, registered charity number 208123, the residue of my estate absolutely and I direct that: i) the assets comprising such residue may be used for the general purposes of the Trust and ii) a receipt signed by a person for the time being authorised by the Trustees of the Trust shall be a good and sufficient discharge to my executors.”

## **Pecuniary bequest (a gift of a stated sum of money)**

“I give to Surrey Wildlife Trust, registered charity number 208123, the sum of £.... and I direct that i) such money may be used for the general purpose of the Trust and ii) a receipt signed by a person for the time being authorised by the Trustees of the Trust shall be a good and sufficient discharge to my executors.”

## **Specific bequest (a gift of an item)**

“I give to Surrey Wildlife Trust, registered charity number 208123, my (shares in XXX company, paintings, jewellery, personal effects, house etc.) and I direct that i) such assets may be sold and the proceeds used for the general purposes of the Trust and ii) a receipt signed by a person for the time being authorised by the Trustees of the Trust shall be a good and sufficient discharge to my executors.”



# Let your love for nature... ...live on

Surrey Wildlife Trust manage habitat in local nature reserves, ranging from ancient woodlands and wildflower meadows to grass chalkland and precious wetland. Here, wildlife – both common and rare – can flourish under ideal conditions.

The Trust works with other landowners to encourage land management for wildlife and offer expert advice for community groups. We provide opportunities for thousands of local children and through our Wilder Schools program we're inspiring the next generation to take action for nature.

With support from people like you, we can secure the future of Surrey's wild places.



**Surrey**  
Wildlife Trust

Registered charity number: 208123  
Company registered number: 00645176

## Contact us:

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