

# Leaving a Gift to Phyllis Tuckwell in your Will



Phyllis<sup>®</sup>  
Tuckwell  
Hospice Care  
...because every  
day is precious

Information Pack



*Leaving a Gift in your Will would help us  
to provide vital care in years to come.*



## **Thank you for considering leaving a gift to Phyllis Tuckwell in your Will. This incredible kindness is appreciated by us all.**

This leaflet will provide you with some information about making a Will. Having a Will in place will ensure that, in the event of your death, your estate will go to the people and causes that matter to you the most. If you don't make a Will, dying intestate can mean that your loved ones are not provided for and your wishes are not carried out.

Writing your Will is usually quite straightforward, and the information on the following pages should tell you what you need to get started. It will also tell you a bit more about leaving a gift in your Will to Phyllis Tuckwell.

***Thank you so much for your kindness and support. Your generosity means we will continue to provide high quality care to those who need us most, for many years to come.***

**Sarah Church, Phyllis Tuckwell**  
Chief Executive

# How do I get started?

## Making a Will

We would always recommend you consult a solicitor or legal advisor when making or amending your Will. To find a solicitor, you can search the official directory of solicitors at [www.lawsociety.org.uk](http://www.lawsociety.org.uk).

You can also take advantage of our Make A Will Month where generous local solicitors agree to waive their fee in return for a suggested donation to Phyllis Tuckwell. Please visit [www.pth.org.uk/makeawillmonth](http://www.pth.org.uk/makeawillmonth) for dates and more information.

## Questions about making a Will

### I already have a Will - can I change it?

Yes. If you already have a Will and would like to update it to include a gift to Phyllis Tuckwell, you can do this by making a simple addition to your existing Will. This is called a codicil.

By adding this document, you can add and delete instructions without having to go through the Will-writing process again.

### What kind of gift can I leave in my Will?

Once you have decided that you would like to leave a gift to Phyllis Tuckwell in your Will, there are a few ways you can do this.

You can choose to donate:

- *a pecuniary gift* – a specific sum of money
- *a residuary gift* – a percentage, or the remainder, of your estate
- *a specific gift* - a named item, for example a piece of jewellery or art, or some shares.

***Please always check with a solicitor or legal advisor when making or amending a Will.***



# David's Story



## Leaving a gift in your Will could help more people like David.

When David's doctor first suggested referring him to Phyllis Tuckwell, David was reluctant.

*"Straight away I thought 'a Hospice? No way!' But my doctor said 'just give it a try'."*

Pam, one of our Clinical Nurse Specialists, visited David at home, to explain more about our services. *"I told her that I wasn't keen, but she said 'why don't you come and see what it's like' - so I did, and **I was totally gobsmacked!**"*

David was offered six weekly Day Hospice sessions, part of our Living Well service. Living Well is designed to help patients and their families to manage the impact of their illness, cope with changes, improve their wellbeing and remain as independent as possible. Support is tailored to each individual's needs, and includes helping patients to remain as mobile as possible, feel more in control, make choices about their current and future care, and develop coping strategies to help manage their illness.

*"They told me that they'd give me advice on what treatment I needed, and work with my GP to take care of me. Well, I couldn't say no. **Since I started coming here it's been absolutely amazing.**"*

At Day Hospice, David accesses nursing care and therapies, and meets other patients who are in a similar situation. He can attend any of the Living Well sessions that day, and is served a three-course lunch which he eats with the other Day Hospice attendees. This social aspect is important and many patients form strong friendships with those they meet there.

***"Since coming to Phyllis Tuckwell, my view on hospices has totally changed," smiles David. "It's not only the facilities, it's the people that run the place and are involved in it. I can't praise it enough."***



# Reasons to write your Will

## Make your wishes known in writing



Writing your Will and keeping an up to date Will means the people and causes that matter to you will be looked after in the way you want. You can make financial provision for close family, ensure your pets are cared for, and even include your funeral wishes, all of which will give you peace of mind so you can get on with enjoying life.

## Help your family and friends



Having a Will in place is reassuring for your loved ones. It will help them take care of your estate in the event of your death, knowing that they are acting on your wishes.



## Protect your partner's rights

If you are not married or in a civil partnership, the only way to ensure that your partner is protected and looked after is by including them in your Will.

## Give your assets to the people and causes you care about

Without a Will that sets out your wishes, the law will decide what happens to your estate when you die. By writing a Will, you will have control over your estate and what happens to it.



## Minimise Inheritance Tax

Having a Will and including legacies to charities such as Phyllis Tuckwell may reduce the amount of Inheritance Tax that needs to be paid on your estate.





# Good reasons to leave a gift to us in your Will

## What difference will my gift make to Phyllis Tuckwell?

### Your gift will help secure life-changing hospice care in our community

Gifts in Wills matter to Phyllis Tuckwell because they provide a fifth of our annual income. This means that the money we receive through legacies pays for the care of 1 in 5 of our patients.

### Your gift will be highly valued

Every legacy that we receive, of any size, is very special. They represent that person's last wishes, and are often made in memory of someone we have cared for.



**1 in 5 of our patients is cared for thanks to gifts in Wills.**

## **Your gift will make a difference**

Your gift will help local people who are living with an advanced or terminal illness, to live life to the full during the precious time they have. Every gift, large or small, makes a difference, helping us to build our financial security and to grow our services, enabling us to reach more people who need our care, both now and in the future.

Here at Phyllis Tuckwell, we have a specialist team of Doctors, Nurses, Therapists, Counsellors, Chaplains, Social Work Advisors and Benefits & Entitlements Advisors, who currently support an average of 250 patients, relatives and carers each and every day:

- at the Hospice In Farnham,
- at the Beacon Centre in Guildford,
- in the local community,
- in patients' own homes.

## **Your gift will be a testament to you**

Gifts in Wills are deeply personal. Most people who leave a gift to charity, choose a cause that they care greatly about, and in doing this celebrate their own lives and values. Their legacy continues to support that which was important to them in life, even after their death. People give in memory, in gratitude and as an investment in our future. Whatever your motivation, your legacy to Phyllis Tuckwell will be a testament to you, your vision and your generosity.

## **Your gift will be tax free and could reduce your Inheritance Tax**

Did you know that leaving a gift in your Will is tax-free? Having a Will and including a gift to Phyllis Tuckwell may also reduce the amount of inheritance tax that needs to be paid on your estate.

If you choose to leave a gift to Phyllis Tuckwell in your Will, we recommend that you advise your next of kin of your decision. We would also much appreciate it if you could let us know too, using the form at the end of the leaflet, so that we can thank you, but this is entirely up to you.

***Phyllis Tuckwell has made my life start again. When I first came to the Beacon Centre I was very anxious, but I left the same day as calm as could be. It was unbelievable to come here so on edge, and leave with such a peaceful mind. It's somewhere for me to come to rest my mind and think of the future, more than I would if I was at home."***

**A Phyllis Tuckwell patient**





# Glossary

## Administrator

A person appointed when either no Will can be found or there is no executor to carry out the intentions of the Will.

## Assets

Generally the property owned by the person who died. For example, a house, household goods, savings, investments, a car, etc.

## Bequest

A gift left in a Will.

## Codicil

A document that amends (rather than replaces) a Will. Codicils can adversely affect a Will, altering, cancelling or adding provisions to it. It must abide by the same legal requirements as the original Will (such as the signature of the testator), and must also have two witnesses who do not benefit from the Will in any way.

## Beneficiary

Someone who is entitled to receive a specific gift, sum of money or share of the estate.

## Chattels

Any item of personal property that can be moved from place to place. This includes contents of a house, furniture, belongings or a car.

## Conditional gift/legacy

A gift which only takes effect if a specific condition is met on your death.

## Executor

A person or persons appointed in the Will to administer the estate.

## Estate

All the assets you own, minus the value of any debts that you owe.

## Grant of probate (England, Wales and Northern Ireland)

This is the legal document that may be required to administer the estate of someone who has died. With this document, executors of the estate can then carry out their legal, tax and administrative duties.

## Inheritance Tax

Tax payable when the estate is over the inheritance threshold (currently £325,000).

## Intestate

A person who has died and not left a legally valid will.



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### **Legacy**

A gift of a specific item or cash sum left in a Will (except property).

### **Legator**

Someone who has left a legacy in their Will.

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### **Liabilities**

Financial obligations (such as debts or tax bills) which may need to be settled by your estate after your death.

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### **Mirror Will**

This is when a husband, wife or partner make almost identical Will, for example, leaving everything to each other should one partner die, or, if both die together, to another agreed beneficiary.

### **Pecuniary gift/legacy**

A gift of money left in a Will.

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### **Predeceased**

Someone who dies before the person who has made the Will.

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### **Probate**

Probate is the entire process of administering a dead person's estate. It involves paying any taxes and debts, as well as organizing their assets and distributing them as inheritance.

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### **Residuary beneficiary**

A person entitled to the residue.

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### **Residue**

Everything that is left in the estate after all the liabilities, tax, costs and legacies have been paid.

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### **Single Will**

This type of Will is written for just one person. But you can write a Single Will if you are in a relationship, married or in a civil partnership. In fact, if your partner already has a Will or their wishes differ to yours, then a Single Will is often your best option.

### **Residuary gift/legacy**

A share, percentage or sometimes all, of an estate after all the other payments have been made. One of the advantages of a residuary gift is that it doesn't lose value over time. If you leave a proportion to us, you can still ensure other beneficiaries are provided for first.

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### **Specific gift/legacy**

A gift of a particular item, such as property, antiques, jewellery or shares.

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### **Testator/testatrix**

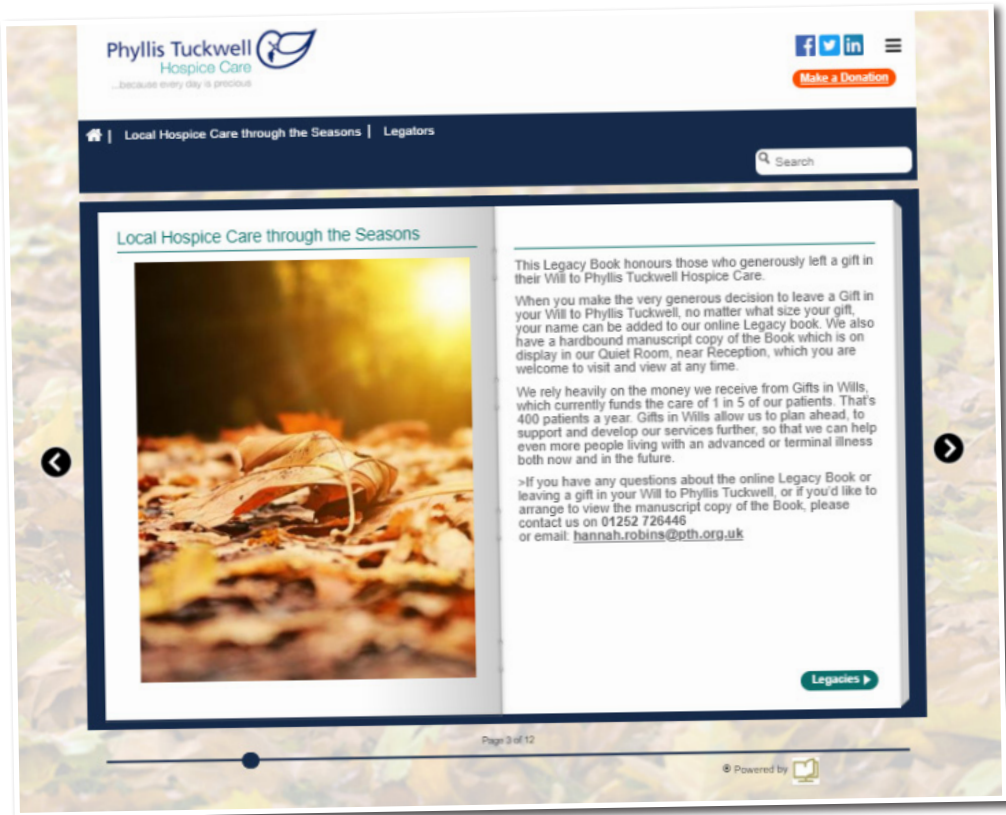
The person (male/female) who makes the Will.

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# Your support will be remembered for years

When you leave a gift in your Will to Phyllis Tuckwell, no matter what size, you can opt for your name to be added to our Legacy Book, which is displayed at the Hospice in Farnham, after you have died, so that your generosity can be remembered for years to come. We have also launched an online Legacy book, enabling relatives from further afield to be able to see the book.

If you are happy for your name to appear in our Legacy Books, please do let us know when you inform us of your wish to leave a legacy.




Phyllis Tuckwell Hospice Care  
...because every day is precious

Local Hospice Care through the Seasons | Legators

Search

### Local Hospice Care through the Seasons



This Legacy Book honours those who generously left a gift in their Will to Phyllis Tuckwell Hospice Care.

When you make the very generous decision to leave a Gift in your Will to Phyllis Tuckwell, no matter what size your gift, your name can be added to our online Legacy book. We also have a hardbound manuscript copy of the Book which is on display in our Quiet Room, near Reception, which you are welcome to visit and view at any time.

We rely heavily on the money we receive from Gifts in Wills, which currently funds the care of 1 in 5 of our patients. That's 400 patients a year. Gifts in Wills allow us to plan ahead, to support and develop our services further, so that we can help even more people living with an advanced or terminal illness both now and in the future.

>If you have any questions about the online Legacy Book or leaving a gift in your Will to Phyllis Tuckwell, or if you'd like to arrange to view the manuscript copy of the Book, please contact us on 01252 726446 or email: [hannah.robins@pth.org.uk](mailto:hannah.robins@pth.org.uk)

Legacies

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Powered by

# Pledge Form

**THANK YOU for supporting us in such a special way.**

If you have left a gift to Phyllis Tuckwell in your Will, we would be extremely grateful if you could let us know, so we can thank you in your lifetime. Alternatively, if you would like any further information before you make your decision, please do let us know, using the form below.

**Title:** \_\_\_\_\_ **First Name:** \_\_\_\_\_

**Surname:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_ **Postcode:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Telephone / Mobile Number:** \_\_\_\_\_

**Please tick the appropriate box:**

☐ I have already included Phyllis Tuckwell Hospice Care in my Will and my gift will be:

☐ a percentage of the residue of my estate

☐ a cash gift

☐ a gift of a specific item

Would you like your name to be added to our Legacy Books in the future?

☐ YES ☐ NO

If YES – please specify how you would like your name to appear in the Book:

\_\_\_\_\_

☐ I would like to talk to someone from Phyllis Tuckwell before I make a decision to leave a gift in my Will – please contact me to discuss this.

We would love to know what your reason is for leaving Phyllis Tuckwell a gift in your Will.

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Please return this form using the Freepost envelope provided or to Phyllis Tuckwell Hospice Care, Waverley Lane, Farnham, Surrey GU9 8BL

## **Our Privacy Notice - protecting your personal data**

Phyllis Tuckwell handles and retains all personal data in accordance with our Privacy Notice. The terms of this Notice are set out in full at **[www.pth.org.uk/privacy](http://www.pth.org.uk/privacy)** or call **01252 729446** to request a printed copy.

Phyllis Tuckwell Hospice Care, Registered Charity Number 264501

W **[www.pth.org.uk](http://www.pth.org.uk)** T **01252 729 446** E **[support@pth.org.uk](mailto:support@pth.org.uk)**

# All care provided by Phyllis Tuckwell is given completely free of charge.

We rely on the generosity of caring people like you to enable us to provide the exceptional standard of clinical care and support that we provide to patients, their carers and families at a critical time in their lives.

Please call our Legacy Officer, **Hannah Robins** on **01252 729446** for more details, or find out more at [www.pth.org.uk](http://www.pth.org.uk)



Phyllis Tuckwell Hospice Care,  
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Phyllis Tuckwell Memorial Hospice Ltd.  
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