

# **A Gift in your Will information toolkit**

## **Step One. Choose a good solicitor**

Although a 'home made' Will may sometimes be adequate in specific cases it is usually as a result of luck rather than judgement. It is always beneficial to get tailor made advice from a professional. Solicitors who specialise in Wills can be located via the Law Society. If you are also considering how to leave your assets for your disabled relatives it is especially important to consult a solicitor who is experienced in matters concerning disabilities.

Again, you can get details of solicitors with such experience from the Law Society.

The solicitor will usually provide a questionnaire for you to complete before meeting to discuss your requirements, some of the key issues you should consider before meeting your solicitor are set out below.

## **Step Two. Executor(s)**

All Wills need one or more Executors (one or more adults appointed by you in your Will to ensure all your wishes are carried out when you die). It is a good idea to make sure that you have confirmed with the potential Executor(s) that they are happy to take this role on, if you cannot think of anyone your solicitor can advise and if necessary act as professional Executors.

## **Step Three. Decide on your Beneficiaries**

These are people and causes you wish to benefit from your Will. Before you visit the solicitor you will need to know their names and addresses and how you wish for them to benefit:

### **Residuary gift**

We understand that you need to look after your family and friends, which is why many individuals leave a residuary gift in their Will. This is a share of the remainder or 'residue' of their estate when all other gifts and payments have been made.

### **Pecuniary gift**

A pecuniary legacy is a set sum of money. Please be aware that inflation may well reduce its value over time.

### **Giving an item**

You can choose to leave specific items like jewellery or a painting to people or causes. You might want to consider taking a photo of the item and keeping it with your will to help avoid confusion when sorting out your estate.

### **Step Four. Have the Will witnessed.**

When your Will has been drawn up, and you agree with the result, it will need to be properly signed and witnessed by two witnesses who have nothing to gain from the Will. Your solicitor will advise.

### **Step Five. Keep the Will in a safe place.**

Most people ask their solicitor or bank manager to look after their Will. If you do not wish to do this, make sure you keep it in a safe place and trust someone close to you, who knows where to find it. If you do choose to leave a gift in your Will to Northallerton and the Dales Mencap Society, the words you will need to add to your Will or codicil are;

“I leave..... To Northallerton and the Dales Mencap Centre, Mencap Centre, Goosecroft Lane, Northallerton, Registered Charity Number 224222”

If you would like to get in touch with someone at Northallerton and the Dales Mencap Society about leaving a Gift in your Will please contact Sue Lear, Development Officer, Northallerton and the Dales Mencap Society, who will be happy to help.