What gift would you like to leave?

There are a number of ways a gift can be left to Somerville Heart Foundation.

- Leaving a share of your estate to Somerville Heart Foundation. A good way to help Somerville Heart Foundation is to leave all or part of what is left of your estate after other gifts have been paid. This type of gift is easy to add to an existing will without interfering with any specific sums you have left to family or friends. It also has the advantage that it will not be eroded in value by inflation.
- Leaving a fixed sum of money. You may wish to leave Somerville Heart Foundation a stated sum of money. With this kind of gift it is wise to remember that the value of money changes over the years, and you may need to alter your will periodically to keep up with inflation.
- Leaving a gift on special conditions. You can leave a conditional gift so that if the person you intend to benefit dies before you, Somerville Heart Foundation can benefit without you having to change your will. You can also leave a gift so that the value is left for the benefit of a dependant and only on the death of that person does Somerville Heart Foundation get your gift. This is called a reversionary gift.

The income we have received from gifts in wills in the past has enabled us to continue our work; a gift in your will of any size will help us do so in the future.

Somerville Heart Foundation

Contact us

www.sfhearts.org.uk
01473 252007
info@sfhearts.org.uk

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WILLS & LEGACIES

Somerville Heart Foundation | Adult Congenital Heart Disease

ACHD

For young people and adults born with a heart condition

Every gift in a will makes a difference

All of us need to make a will. It is the only way we can make sure that our affairs are left in order and that our possessions go to the people we want to have them.

Yet a will can also be sorting out more than this. For most of us, it is the best opportunity we ever have in our lives to make a really worthwhile contribution to a cause which we either believe in, have gained from, or both. It's a chance to put something back or say "thank you" for something or to recognise a benefit enjoyed by someone else close to us.

Naturally, if you have close family, the main portion of your will, no doubt, will be to provide for them. Yet after you have considered this, there may be an opportunity to give a little more, by helping Somerville Heart Foundation provide support for those who were born with a serious heart condition, carry on the fight for services and be there for advice when the need arises.

Even a modest gift in your will could make a real difference

Remember that a gift in your will to a registered charity like Somerville Heart Foundation is exempt from Inheritance Tax (40%), which could reduce the tax burden on your estate.

Making or changing your will is simple

Many people think that it is complicated to make or change a will, but follow the simple steps below and you will find it straightforward.

Changing your will

When you want to change your will, there are two ways to do this:

- If the change is small, your solicitor or professional advisor can draw up a codicil – an additional instruction which must be kept with your will.
- If you are making significant changes, it will be better to start again and make a new will.

Making a new will

1. Find yourself a solicitor. Alternatively these days, most banks and some other types of professional advisors, such as accountants, can make your will for you.
2. Get an idea of what it will cost in advance. A simple will can cost as little as £50 – and if you want to be sure of getting the best value, you can ask for quotes from a number of solicitors or banks and compare their prices.
3. Be prepared before you go along to see your professional adviser. This way you can make the whole process as straightforward (and less expensive) as possible. In particular:
   - Make a list of all your assets: house, car, personal possessions, insurance policies, savings, pension plan and so on. Don't forget to list your liabilities as well – for example your outstanding mortgage and any debts.
   - Make a list of the people you want to benefit from your will. Including their full names and addresses. If you are thinking of leaving money to Somerville Heart Foundation, be sure to include our full name and address, and registered charity number (see back page).
   - Decide who you want to be your executors. It is wise to appoint two executors, in case one is not able to take on the responsibilities when the time comes. Often people choose members of their family (especially as it is possible to be both an executor and a beneficiary). But a professional advisor, such as a solicitor can also be your executor – though they will charge a fee.